



# NORTHFIELD

## *Commercial Insurance Leads*

Please call your leads within 48 hours

Marketing Rep: \_\_\_\_\_

Call Date/Time: \_\_\_\_\_

### **Company Information**

You are calling on behalf of:

We are based out of:

### **Association Name/Decision Maker**

Company Name:

Decision Maker/Title:

Address:

City/State/Zip:

Phone:

### **Renewal Information**

Liability Insurance Renewal Date:

Co:

Workers Comp Renewal Date:

Co:

Auto Renewal Date:

Co:

Number of Autos/Trucks:

Health Insurance Renewal Date:

Co:

Group Life Insurance Renewal Date:

Co:

\*If their renewal is not up for several months ask if you can give their information to one of our agents to let them follow up with them when it gets closer to their renewal.

### **Lead Details**

Current Agency & Agent's Name:

Years in business:

Number of employees:

Besides price, is there any other motivator for moving your insurance?

Comments:

Best time to call: