



# AGENCY QUESTIONNAIRE

DATE (MM/DD/YYYY)

AGENCY NAME AND ADDRESS	PRIMARY CONTACT:			FISCAL YEAR END:		
	PHONE (A/C, No, Ext):			NATIONAL PRODUCER #:		
	FAX (A/C, No):			CONTRACT #:		
	E-MAIL ADDRESS:			FEIN:		
	WEBSITE ADDRESS:			CITY POPULATION:		
	E&O LIMITS		CARRIER:		EXP DATE:	
EA CLAIM \$		EA OCC \$		AGGREGATE \$		
LEGAL ENTITY	INDIVIDUAL	PARTNERSHIP	CORPORATION	SUBCHAPTER "S" CORP	LLC	

**COMPANY REQUESTING SURVEY****AGENCY PREMIUM / MIX OF BUSINESS SUMMARY**

SEND COMPLETED SURVEY TO:	TOTAL PREMIUM VOLUME	PERSONAL LINES PERCENTAGE	COMMERCIAL LINES PERCENTAGE	LIFE & HEALTH PERCENTAGE
	\$	%	%	%
	# OF AGENCY LOCATIONS	# OF AGENCY EMPLOYEES	STATES	

**AGENCY PROFILE (PRINCIPALS, MANAGERS, CSRS, PRODUCERS) (Attach additional sheets if more space is required)**

NAME / TITLE / E-MAIL ADDRESS	HIRE DATE	PROFESSIONAL DESIGNATIONS	LICENSE NUMBER(S)	STATE
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	
NAME:			P&C AGENT:	
TITLE:			P&C BROKER:	
E-MAIL ADDRESS:			LIFE & HEALTH:	

**AGENCY / BRANCH OFFICES**

AGENCY #:	BRANCH #:	PRIMARY CONTACT:	FISCAL YEAR END:	
NAME AND ADDRESS		PHONE (A/C, No, Ext):	NATIONAL PRODUCER #:	
		FAX (A/C, No):	CONTRACT #:	
		E-MAIL ADDRESS:	FEIN:	
		WEBSITE ADDRESS:	CITY POPULATION:	
		E&O LIMITS	CARRIER:	EXP DATE:
		EA CLAIM \$	EA OCC \$	AGGREGATE \$
AGENCY #:	BRANCH #:	PRIMARY CONTACT:	FISCAL YEAR END:	
NAME AND ADDRESS		PHONE (A/C, No, Ext):	NATIONAL PRODUCER #:	
		FAX (A/C, No):	CONTRACT #:	
		E-MAIL ADDRESS:	FEIN:	
		WEBSITE ADDRESS:	CITY POPULATION:	
		E&O LIMITS	CARRIER:	EXP DATE:
		EA CLAIM \$	EA OCC \$	AGGREGATE \$

**AGENCY PREMIUM / MIX OF BUSINESS**

COMPANY	COMMERCIAL LINES VOLUME	LOSS RATIO	INTERFACE (Check all that apply)			
			DOWN-LOAD	UP-LOAD	REAL TIME	WEB SITE
	\$	%				
	\$	%				
	\$	%				
COMPANY	PERSONAL LINES VOLUME		INTERFACE (Check all that apply)			
			DOWN-LOAD	UP-LOAD	REAL TIME	WEB SITE
	\$	%				
	\$	%				
	\$	%				
COMPANY	LIFE / HEALTH VOLUME		INTERFACE (Check all that apply)			
			DOWN-LOAD	UP-LOAD	REAL TIME	WEB SITE
	\$	%				
	\$	%				
	\$	%				

**TECHNOLOGY INFORMATION**

AGENCY AUTOMATION SYSTEM				USER GROUP(S)		YES	NO
VENDOR NAME	MODEL (Local, ASP)	# USER WORKSTATIONS	SERVER OPERATING SYSTEM	NAME:	ACTIVE MEMBER?		
				NAME:	ACTIVE MEMBER?		
SYSTEM NAME	VERSION	MINIMUM SYSTEM SPEED	BROWSER	DO YOU PAY TECHNICAL SUPPORT?			
			BROWSER VERSION	DESCRIBE OTHER SUPPORT			
DATE LAST PATCH INSTALLED:			DATE LAST VERSION UPGRADE WAS INSTALLED:				
AGENCY AUTOMATION SYSTEM				USER GROUP(S)		YES	NO
VENDOR NAME	MODEL (Local, ASP)	# USER WORKSTATIONS	SERVER OPERATING SYSTEM	NAME:	ACTIVE MEMBER?		
				NAME:	ACTIVE MEMBER?		
SYSTEM NAME	VERSION	MINIMUM SYSTEM SPEED	BROWSER	DO YOU PAY TECHNICAL SUPPORT?			
			BROWSER VERSION	DESCRIBE OTHER SUPPORT			
DATE LAST PATCH INSTALLED:			DATE LAST VERSION UPGRADE WAS INSTALLED:				
AGENCY STAFF THAT PARTICIPATES REGULARLY IN DAY-TO-DAY USE OF AGENCY AUTOMATION SYSTEM FOR SALES AND/OR SERVICE							
<input type="checkbox"/> CSRs <input type="checkbox"/> PRODUCERS <input type="checkbox"/> CLAIMS <input type="checkbox"/> ACCOUNTING <input type="checkbox"/> MANAGEMENT							
TYPE OF CONNECTION TO INTERNET							
<input type="checkbox"/> DSL <input type="checkbox"/> T1 <input type="checkbox"/> FRACTIONAL T1 <input type="checkbox"/> CABLE <input type="checkbox"/> DIAL-UP							
RATING VENDOR NAME				RATING SYSTEM NAME			
KEY AGENCY IT CONTACT(S)				E-MAIL ADDRESS(ES)			

**GENERAL INFORMATION**

1. DOES EVERY EMPLOYEE IN YOUR AGENCY HAVE A WORK STATION WITH ACCESS TO:	a) INTERNET	YES	NO
PLEASE EXPLAIN "NO" RESPONSES IN REMARKS.	b) E-MAIL		
	c) AGENCY AUTOMATION SYSTEM		
2. DOES YOUR AGENCY INPUT POLICY AND TRANSACTIONAL DETAIL FOR ONLY SPECIFIC TYPES OF BUSINESS?			
IF "YES", EXPLAIN IN REMARKS.			
3. DOES YOUR AGENCY PLAN ON CHANGING YOUR AGENCY AUTOMATION SYSTEM VENDOR WITHIN THE NEXT YEAR?			
IF "YES", EXPLAIN IN REMARKS.			

REMARKS (Attach additional sheets if more space is required)

ATTACHMENTS

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