

		Companies					
Claims	Timeliness						
	Fairness						
Policy Issuance	Timeliness						
	Accuracy						
Products	Variety						
	Quality						
	Pricing						
Automation	Direct Bill Facilities						
	Interface Capabilities						
	Agency Automation Resources						
Underwriting	Responsiveness						
	Consistency						
	Flexibility						
Marketing	Compatible Philosophy						
	Advertising Support						
	Professional Field Staff						
	Quality Agency Contract						
Education	Variety						
	Quality						
Agency Management	Variety						
	Quality						
Accounting	Premium Finance Plans						
	Account Payment Options						
Commissions	Basic						
	Excess						
	Contingencies						
Other Production Incentives	Financial Assistance						
	Producer Development Aid						
	Travel Prizes						
Financial Position	Strength						
	Stability						
Management	Responsiveness						
	Competitive Attitude						
	Flexibility						
	Support of Agency System						
TOTAL							

Track submissions, quotes and written policies by company, month and year. Use this form or preferably a spreadsheet.

Year: _____

		Companies						
January	Submissions							
	Quotes							
	Policies Written							
February	Submissions							
	Quotes							
	Policies Written							
March	Submissions							
	Quotes							
	Policies Written							
April	Submissions							
	Quotes							
	Policies Written							
May	Submissions							
	Quotes							
	Policies Written							
June	Submissions							
	Quotes							
	Policies Written							
July	Submissions							
	Quotes							
	Policies Written							
August	Submissions							
	Quotes							
	Policies Written							
September	Submissions							
	Quotes							
	Policies Written							
October	Submissions							
	Quotes							
	Policies Written							
November	Submissions							
	Quotes							
	Policies Written							
December	Submissions							
	Quotes							
	Policies Written							
TOTAL	Submissions							
	Quotes							
	Policies Written							