

LOST BUSINESS REPORTS

The goal is to identify our customers who are no longer clients of the agency (and why they left).

A lost business report is required to be turned in monthly (for the previous month). Each agent is responsible for a report regarding business assigned to them.

Follow these instructions in EZ Lynx to generate the report:

1. Go to Reports, select Policy Management from Category list.
2. Select – Policy Transaction Details - from options.
3. Change filters (at top of page) – input Date Range, select Branch(s), Select Agent(s), then under Transaction Type select “Cancel Conf.”
4. Hit Update Report button.
5. Print report.

Actions regarding the report:

All policies listed that were moved to another company, within the agency, should be crossed off the list.

Adjust the “total” (Total Customers - at top left of page) to reflect number of Customers that are no longer with the agency.

Note GR next to any Customer that is no longer with the agency for a Good Reason. This would include sold vehicle(s) or home, moved away, quit driving, seasonal coverage, no longer in business, etc.). Call those that you do not know the reason.

Write the remaining number of lost Customers (not moved or not GR) on the front page (circle it).

Attach your report to your monthly commission report.

Be sure to review the report for reasons and actions that may result in business coming back to us. Place anyone who might come back (example - those that left based on price) on a reminder notice to call them in 10 months.