

# The Commercial Prospect Intelligence Document

## A Guided Framework for Smarter Prospecting, Confident Quoting, and Seamless Client Onboarding



This document brings strategy, structure, and speed to every stage of the commercial client journey — from first contact to first renewal. It ensures producers, account executives, and service teams are aligned around the same data, the same process, and the same goal: turning prospects into long-term partners.

 **Powered by The Intelligent Agent** — The Closed-Sourced Digital Mind for Insurance

# Core Objectives

## **Standardize Capture & Qualification**

Establish consistent methods for producers and account executives to capture, qualify, and advance commercial opportunities across all market segments.

## **Eliminate Information Gaps**

Leverage The Intelligent Agent to gather complete risk intelligence, ensuring no critical data points are missed during the prospecting phase.

## **Document Every Touchpoint**

Create one central, auditable record that tracks every interaction from initial prospecting through successful onboarding and beyond.

## **Enable Seamless Handoffs**

Facilitate smooth transitions between sales, service, and leadership teams for every new account, maintaining continuity and client satisfaction.

# Section 1: Prospect Overview

Complete this section during initial contact to establish foundational client information and relationship details.

<b>Prospect / Business Name</b>	_____
<b>Decision Maker(s)</b>	_____ _____
<b>Company Influencers</b>	_____ _____
<b>Title(s)</b>	_____
<b>Contact Information</b>	_____
<b>Address</b>	_____ _____
<b>Website</b>	_____
<b>Email</b>	_____
<b>Phone</b>	_____

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<b>Industry / NAICS / SIC</b>	_____
<b>Lines of Coverage Sought</b>	_____ _____
<b>Current Carrier(s)</b>	_____
<b>Renewal Dates</b>	_____
<b>Estimated Annual Premium</b>	_____
<b>Referral or Connection Path</b>	_____ _____ _____

# Section 2: Company Intelligence

**Required:** Run the Pain Point Questionnaire in The Intelligent Agent before completing this section. Attach summary output below.

Data Point	Notes
Years in Business	_____
Number of Employees	_____
Annual Revenue (Estimated)	_____
Key Operations Summary	_____ _____ _____
Current Broker / Agency	_____
Known Pain Points	_____ _____ _____
Recent Growth or Expansion	_____ _____
Leadership Changes	_____ _____
Mergers, Acquisitions, or Ownership Changes	_____ _____

**Attach:** Pain Point Report | Company Profile Snapshot | Market Intel Summary

# Section 3: Risk Profile & Assessment

**Required:** Run a Risk Assessment inside The Intelligent Agent to gather all exposure details, class codes, operations data, and submission-ready content.

Category	Key Findings	Verified
Operations Summary	_____ _____ _____ _____	<input type="checkbox"/>
Property Exposures	_____ _____ _____ _____	<input type="checkbox"/>
Liability Exposures	_____ _____ _____ _____	<input type="checkbox"/>
Auto / Fleet	_____ _____ _____ _____	<input type="checkbox"/>
Workers Compensation	_____ _____ _____ _____	<input type="checkbox"/>
Umbrella / Specialty Lines	_____ _____ _____ _____	<input type="checkbox"/>
Safety Programs	_____ _____ _____ _____	<input type="checkbox"/>
Claims History	_____ _____ _____ _____	<input type="checkbox"/>
Carrier Appetite Alignment	_____ _____ _____ _____	<input type="checkbox"/>

**Attach:** TIA Risk Assessment Output | Loss Runs | Photos / Documentation

# Section 4: Prospecting & Engagement Log

Track all client interactions to maintain continuity and inform strategic decision-making. Use The Intelligent Agent's Prospecting Guide for discovery questions, qualifying patterns, and nurturing strategies.

Date	Type (Call, Email, Meeting)	Summary	Next Step
_____	_____	_____ _____ _____ _____	_____ _____
_____	_____	_____ _____ _____ _____	_____ _____
_____	_____	_____ _____ _____ _____	_____ _____
_____	_____	_____ _____ _____ _____	_____ _____
_____	_____	_____ _____ _____ _____	_____ _____
_____	_____	_____ _____ _____ _____	_____ _____

# Section 5: Opportunity Summary

Consolidate key metrics and decision factors to evaluate opportunity viability and prioritize resources effectively.

Field	Input
Estimated Annual Premium	_____
Estimated Commission	_____
Lines of Business	_____ _____ _____
Decision Timeline	_____
Competitor Broker	_____

<b>Current Carrier / Expiring Policy Info</b>	_____ _____ _____
<b>Buying Triggers Identified</b>	_____ _____ _____ _____
<b>Relationship Strength</b>	<input type="checkbox"/> Weak <input type="checkbox"/> Moderate <input type="checkbox"/> Strong
<b>Close Probability</b>	<input type="checkbox"/> 25% <input type="checkbox"/> 50% <input type="checkbox"/> 75% <input type="checkbox"/> 100%

# Section 6: Proposal & Quoting Strategy

Execute a comprehensive quoting strategy that positions your agency as the trusted advisor and preferred partner.

Task	Notes / Attachments	Completed
Gather quotes from preferred carriers	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Generate proposal using The Intelligent Agent Proposal Framework	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Conduct internal strategy meeting with AE / AM	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Schedule proposal presentation	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Identify differentiators to highlight	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Prepare follow-up templates	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>

**Attach:** Proposal Summary | Coverage Comparison | Recommendation Sheet | Carrier Notes

# Section 7: New Customer Onboarding Strategy

Once the client has signed and coverage is bound, use this section to build the onboarding roadmap before renewal management begins. Create a structured, transparent transition from sale to service.


Task	Owner	Date	Completed
Send Welcome Email using TIA Template	_____	_____	<input type="checkbox"/>
Schedule Introduction Call (Client + Service Team)	_____	_____	<input type="checkbox"/>
Confirm Preferred Communication Method (email, portal, call)	_____	_____	<input type="checkbox"/>
Provide Access to Client Portal / Certificates	_____	_____	<input type="checkbox"/>
Send 90-Day Service Plan Overview	_____	_____	<input type="checkbox"/>
Assign Primary CSR / AM	_____	_____	<input type="checkbox"/>
Schedule 90-Day Review Call	_____	_____	<input type="checkbox"/>

**Attach:** Onboarding Plan | Welcome Email Copy | Service Calendar

# Section 8: Renewal Strategy Prep

Begin planning for renewal success immediately after binding. This forward-thinking approach ensures continuity, identifies emerging risks early, and positions your team to deliver exceptional ongoing service.

Task	Notes / Attachments	Completed
Schedule Pre-Renewal Meeting (120 days out)	<hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Set Client Expectations	<hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Identify Coverage Adjustments or Risks to Monitor	<hr/> <hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>
Assign Renewal Lead	<hr/> <hr/>	<input type="checkbox"/>
Link to Renewal Excellence Document	<hr/> <hr/> <hr/> <hr/>	<input type="checkbox"/>

 **Goal:** Ensure the next renewal begins on time, with all data flowing seamlessly from the original prospect file.

# Section 9: Final Outcome

Document the resolution of this opportunity to inform future prospecting strategies, refine qualification criteria, and celebrate wins or learn from losses.

Field	Input
Opportunity Status	<input type="checkbox"/> Won <input type="checkbox"/> Lost <input type="checkbox"/> Deferred <input type="checkbox"/> No Response
Bound Date	_____
Bound Carrier(s)	_____ _____
Lines Bound	_____ _____ _____
Total Premium	_____
Commission Earned	_____
Notes / Lessons Learned	_____ _____ _____ _____ _____

# Section 10: Leadership Review

Obtain formal sign-off from all stakeholders to ensure accountability, maintain quality standards, and facilitate seamless cross-functional collaboration throughout the client lifecycle.

<b>Role</b>	<b>Name</b>	<b>Date</b>	<b>Signature</b>
Producer	_____	_____	_____
Account Executive	_____	_____	_____
Sales Leader	_____	_____	_____
Operations / Service Leader	_____	_____	_____

# Best Practices for Document Completion

## Complete Immediately After Contact

Fill out prospect overview and company intelligence sections within 24 hours of initial contact while details are fresh and accuracy is highest.

## Use The Intelligent Agent Throughout

Leverage TIA's automated tools at each stage to ensure comprehensive data capture, reduce manual effort, and maintain consistency across all prospect files.

## Update Weekly During Active Pursuit

Maintain current engagement logs and opportunity status updates to keep all team members informed and enable real-time strategic adjustments.

## Review Before Key Meetings

Conduct a thorough document review prior to proposal presentations, renewal discussions, or leadership check-ins to ensure you're fully prepared.

# Integration with Agency Systems

This document is designed to work seamlessly within your existing technology ecosystem, enhancing rather than replacing your current workflows.

## CRM Integration Points

- Import prospect data directly from your CRM system
- Export completed intelligence to update CRM records
- Sync engagement logs with activity tracking
- Link to policy management systems post-binding

## Document Management

- Store completed documents in centralized repository
- Enable search by prospect name, industry, or status
- Maintain version control for audit compliance
- Generate reports on pipeline health and close rates

📌 Work with your agency's technology team to establish automated workflows that populate this document from existing data sources and push completed information back to your management systems.

# Document Summary & Next Steps

The Commercial Prospect Intelligence Document represents a comprehensive framework for managing high-value commercial accounts from first contact through renewal. By standardizing your approach and leveraging The Intelligent Agent's capabilities, you create a competitive advantage built on superior information, consistent process, and exceptional client experience.

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## Capture Complete Intelligence

Use all sections to gather comprehensive prospect information

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## Execute Strategic Handoffs

Ensure smooth transitions between teams

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## Maintain Active Updates

Keep document current throughout the sales cycle

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## Review and Improve

Analyze completed documents to refine your approach

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### **The Intelligent Agent — The Closed-Sourced Digital Mind for Insurance**

This document is part of the Commercial Intelligence System, built to unify sales, risk, onboarding, and renewal under one consistent framework.

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