

 Overdue: Follow up with Greg Dalzell yesterday @ 4P 🕒 RESCHEDULE ✅ MARK AS COMPLETE

🔍 SEARCH FORA. LEAD BY, NAME PHONE, EMAIL OR UUID

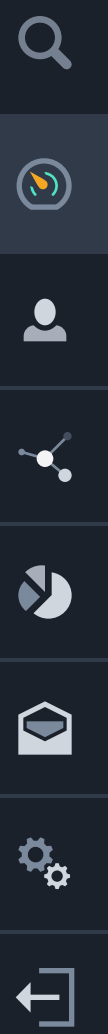
📄 9 AVAILABLE LEADS, GET ONE

+ CREATE A LEAD

YOUR LEADS Showing: One Month Sort By: Callback Time


GREG DALZELL		⚠️ Follow Up: Yesterday, 4P	DID IT! RESCHEDULE	Primary Phone: (202) 555-0134
★★★★★ Auto	Bindable Quote			Working Carrier: Travelers CRUSH IT!
★★★★★ Home	Preliminary Quote			Working Carrier: Travelers CRUSH IT!
JASON MURRAY		Follow Up: Today, 9A	DID IT! RESCHEDULE	Primary Phone: (202) 555-0134
★★★★★ Auto	Bindable Quote			Working Carrier: Safeco CRUSH IT!
KATHERINE SCHNEIDER		Follow Up: Today, 10A	DID IT! RESCHEDULE	Primary Phone: (202) 555-0134
★★★★★ Auto	Preliminary Quote			Working Carrier: Nationwide CRUSH IT!
★★★★★ Home	Preliminary Quote			Working Carrier: Nationwide CRUSH IT!
JULIE HARRIS		Follow Up: 10/22, 10A	DID IT! RESCHEDULE	Primary Phone: (202) 555-0134
★★★★★ Auto	Bindable Quote			Working Carrier: Nationwide CRUSH IT!
★★★★★ Home	Preliminary Quote			Working Carrier: Nationwide CRUSH IT!
LINDA PALMER		Follow Up: None	SCHEDULE ONE!	Primary Phone: (202) 555-0134
★★★★★ Auto	Bindable Quote			Working Carrier: Progressive CRUSH IT!
★★★★★ Renters	Bindable Quote			Working Carrier: ASI/Progressive CRUSH IT!

 Overdue: Send app to Greg Dalzell to sign  SNOOZE  MARK AS COMPLETE




MONTHLY METRICS

[VIEW ALL METRICS](#)



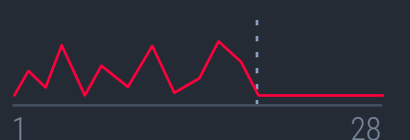
WRITTEN PREMIUM

\$24,310.57




LEADS PER DAY

10.25



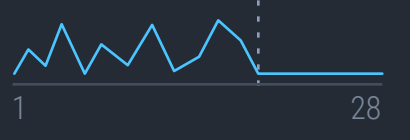
QUOTES PER DAY

9.09



BINDS PER DAY

0.6



CONVERSION RATE

10.6%

SALES ASSISTANT - 14

[CREATE A NEW LEAD](#)

<p>GREG DALZELL Primary Phone: (202) 555-0134 ▲ FOLLOW UP: YESTERDAY, 4P</p>	<p>Auto ★★★★★ Scheduled Callback CRUSH IT!</p>	<p>Home ★★★★★ Preliminary Quote CRUSH IT!</p>	<p>Pet ★★★★★ Not Yet Quoted CRUSH IT!</p>	<p>Life ★★★★★ Opportunity CRUSH IT!</p>
<p>JASON MURRAY Primary Phone: (202) 555-0134 Follow Up: Today, 9AM</p>	<p>Auto ★★★★★ Bindable Quote CRUSH IT!</p>	<p>Renters ★★★★★ Opportunity CRUSH IT!</p>		
<p>KATHERINE SCHNEIDER Primary Phone: (202) 555-0134 Follow Up: Today, 10A</p>	<p>Auto ★★★★★ Preliminary Quote BUNDLE US</p>	<p>Home ★★★★★ Preliminary Quote CRUSH IT!</p>	<p>Life ★★★★★ Opportunity CRUSH IT!</p>	
<p>JULIE HARRIS Primary Phone: (202) 555-0134 Follow Up: Today, 10A</p>	<p>Auto ★★★★★ Bindable Quote CRUSH IT!</p>	<p>Home ★★★★★ Preliminary Quote CRUSH IT!</p>	<p>Pet ★★★★★ Opportunity CRUSH IT!</p>	<p>Life ★★★★★ Opportunity CRUSH IT!</p>
<p>LINDA PALMER Primary Phone: (202) 555-0134 Follow Up: None</p>	<p>Auto ★★★★★ Bindable Quote CRUSH IT!</p>	<p>Renters ★★★★★ Bindable Quote CRUSH IT!</p>		

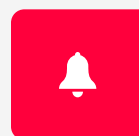
<< Prev 1 2 3 4 5 Next >>

TASK MASTER - 18

[CREATE A NEW TASK](#)

<input type="checkbox"/> Send app to Greg Dalzell to sign	▲ YESTERDAY, 4P
<input type="checkbox"/> Christian Weber rider	TODAY
<input type="checkbox"/> Jason Murray sign app	TODAY - 9A
<input type="checkbox"/> Katherine Schneider signature	TODAY - 10A
<input type="checkbox"/> Julie Harris wife license #	TODAY - 10A
<input type="checkbox"/> Renew insurance license	03/03 - 2P
<input type="checkbox"/> Kathryn Newman MA registration	03/03
<input type="checkbox"/> Mary Reed	03/04 - 3P
<input type="checkbox"/> Kathryn Newman MA registration	03/03
<input type="checkbox"/> Mary Reed	03/04 - 3P

<< Prev 1 2 3 4 5 Next >>



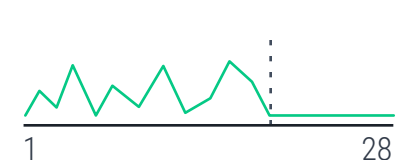
Overdue: Send app to Greg Dalzell to sign

🕒 SNOOZE

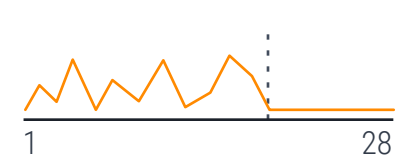
✓ MARK AS COMPLETE

MONTHLY METRICS

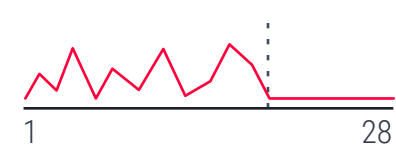
[VIEW ALL METRICS](#)



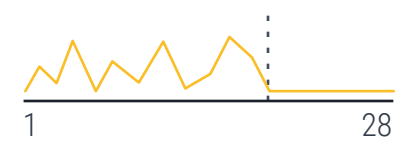
WRITTEN PREMIUM
\$24,310.57



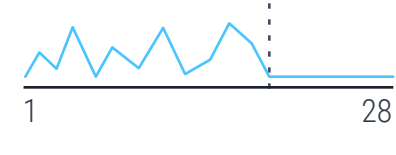
LEADS PER DAY
10.25



QUOTES PER DAY
9.09



BINDS PER DAY
0.6



CONVERSION RATE
10.6%

SALES ASSISTANT - 14

[CREATE A NEW LEAD](#)

GREG DALZELL

Primary Phone: [\(202\) 555-0134](tel:(202)555-0134)

▲ FOLLOW UP: YESTERDAY, 4P

Auto
★★★★★

CRUSH IT!



Home
★★★★★

Preliminary Quote

CRUSH IT!

Pet
★★★★★

Not Yet Quoted

CRUSH IT!

Life
★★★★★

Opportunity

CRUSH IT!

JASON MURRAY

Primary Phone: [\(202\) 555-0134](tel:(202)555-0134)

Follow Up: Today, 9AM

Auto
★★★★★

Bindable Quote

CRUSH IT!

Renters
★★★★★

Opportunity

CRUSH IT!

KATHERINE SCHNEIDER

Primary Phone: [\(202\) 555-0134](tel:(202)555-0134)

Follow Up: Today, 10A

Auto
★★★★★

Preliminary Quote



BUNDLE US

Home
★★★★★

Preliminary Quote

CRUSH IT!

Life
★★★★★

Opportunity

CRUSH IT!

JULIE HARRIS

Primary Phone: [\(202\) 555-0134](tel:(202)555-0134)

Follow Up: Today, 10A

Auto
★★★★★

Bindable Quote

CRUSH IT!



Home
★★★★★

Preliminary Quote

CRUSH IT!

Pet
★★★★★

Opportunity

CRUSH IT!

Life
★★★★★

Opportunity

CRUSH IT!

LINDA PALMER

Primary Phone: [\(202\) 555-0134](tel:(202)555-0134)

Follow Up: None

Auto
★★★★★

Bindable Quote

CRUSH IT!

Renters
★★★★★

Bindable Quote

CRUSH IT!

<< Prev 1 2 3 4 5 Next >>

TASK MASTER - 18

[CREATE A NEW TASK](#)

Send app to Greg Dalzell to sign
VIEW EDIT

▲ YESTERDAY, 4P

Christian Weber rider

TODAY

Jason Murray sign app

TODAY - 9A

Katherine Schneider signature

TODAY - 10A

Julie Harris wife license #

TODAY - 10A

Renew insurance license

03/03 - 2P

Kathryn Newman MA registration

03/03

Mary Reed

03/04 - 3P

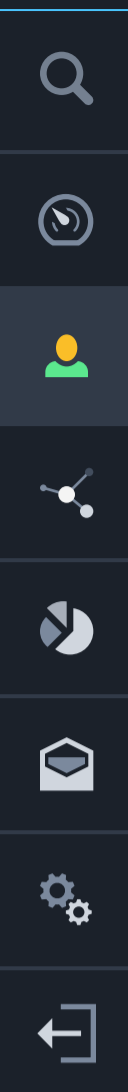
Kathryn Newman MA registration

03/03

Mary Reed

03/04 - 3P

<< Prev 1 2 3 4 5 Next >>



SEARCH AGAIN

SEARCH FOR A LEAD

SEARCH RESULTS FOR: BRENNAN

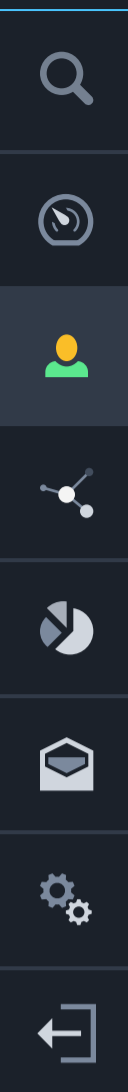
SEARCH WITHIN THE RESULTS

POLICY TYPE:

- AUTO
- HOME
- RENT
- PUMBR
- FLOOD
- PET
- TRAVEL
- LEGAL
- HOMEW

MERGE LEADS

NAME	PHONE	EMAIL	STATE	AGENT	REFCODE	ACTIVE SHELLS	POTENTIAL SHELLS	MODIFIED
MICHAEL BRENNAN	617-410-9027	mbrennster@gmail.com	MA	Wayne Jensen	quorum-mlp-web	AUTO, HOME	PET, LIFE	2021-03-10 15:41:34
HANK MCBRENNANMEN	617-223-4964	patrinut@yahoo.com	OH	Jane Alexander	quorum-mlp-web	AUTO	AUTO, HOME, PET	2021-03-10 15:39:08
MIKE BRENNAN	617-410-9027	mbrennan@nextgenins.com	MA	Nicholas Chavez	quorum-mlp-web		AUTO, HOME	2021-03-10 15:38:39
MITCH BRENNAN	239-555-6280	dat-guy@gmail.com	MA	Howard Soto	mylifeprotected-web	AUTO, HOME	AUTO, RENTERS	2021-03-10 15:33:02
RHODA MARTIN	741-059-4157	boatymcboatface@gmail.com	VT	Martha Patel	bradsdeals-mlp-web	LIFE	AUTO, HOME	2021-03-10 15:20:54
ANNIE RIOS	761-212-4699	adelia_hermann@brain.tv	NY	Nicholas Dunn	massdrive-web	AUTO, HOME, PET	AUTO	2021-03-10 15:07:04
EFFIE SHELTON	505-122-7833	schoen.kaya@hintz.io	LA	Edward Thomas	mylifeprotected-web	RENTERS	HOME	2021-03-10 15:05:53
RONALD INGRAM	238-010-9536	jacobson_ottis@homenick.ca	UT	Alexander Brewer	mylifeprotected-web	AUTO, RENTERS	PET, LIFE	2021-03-10 15:04:29
PAUL MALONE	714-325-1716	rusty.dubuque@hotmail.com	CO	Jason Lewis	massdrive-web	AUTO, HOME	AUTO, HOME, PET	2021-03-10 14:54:49
ANGEL HODGES	596-534-7352	runofsdottir_lempi@erik.net	AK	Philip Carroll	quorum-mlp-web		RENTERS	2021-03-10 14:43:05
GLENN GREER	872-773-8791	marcel.hansen@hotmail.com	CT	Megan Cox	mylifeprotected-web	HOME	AUTO, RENTERS	2021-03-10 14:41:42
KATHARINE MEYER	670-253-3901	tremayne_grady@gmail.com	NV	Julia Jacobs	nwtf-mlp-web	LIFE		2021-03-10 14:37:48
BARRY BUSH	899-130-6415	schiller_colt@gmail.com	AR	Joan Knight	abz-cbc-mlp-web	AUTO, HOME, PET	AUTO	2021-03-10 14:08:48
DORA FRENCH	554-603-0557	kub.rory@gmail.com	FL	Henry Walsh	abz-cbc-mlp-web	RENTERS	HOME	2021-03-10 14:02:22
CALVIN RODGERS	961-860-3401	riley.prosacco@reinger.biz	KY	Bobby Ward	bradsdeals-mlp-web		PET, LIFE	2021-03-10 13:10:27
MABLE MALONE	233-189-2455	oren.goldner@elva.ca	NJ	Jean Torres	mylifeprotected-web	AUTO, HOME	HOME, PET	2021-03-10 14:41:42
CORY RAMIREZ	199-140-7736	stephen.block@hotmail.com	ND	Dorothy Lawson	massdrive-web	AUTO		2021-03-10 14:37:48
ETHEL SCHULTZ	986-830-1473	boehm_gracie@patricia.org	MA	Jordan Gonzalez	mylifeprotected-web	HOME	AUTO, RENTERS	2021-03-10 14:08:48
BRYAN THOMPSON	589-632-3315	taryn_nolan@botsford.info	AL	Gloria Murray	mylifeprotected-web	AUTO, HOME, PET		2021-03-10 14:02:22
ANNIE RIOS	761-212-4699	adelia_hermann@brain.tv	FL	Ronald Chen	massdrive-web	RENTERS	AUTO	2021-03-10 13:10:27



SEARCH AGAIN

SEARCH FOR A LEAD

SEARCH RESULTS FOR: BRENNAN

SEARCH WITHIN THE RESULTS

CANCEL

MERGE THESE LEADS

NAME	PRIMARY PHONE	EMAIL	ADDRESS	ACTIVE POLICIES	POLICY SHELLS	WHICH LEADS?
MICHAEL BRENNAN	617-410-9027	mbrenster@gmail.com	MA Wayne Jensen	quorum-mlp-web AUTO, HOME	PET, LIFE	<input checked="" type="radio"/> THIS ONE
HANK MCBRENNANMEN	617-223-4964	patrinut@yahoo.com	OH Jane Alexander	quorum-mlp-web AUTO	AUTO, HOME, PET	<input type="radio"/> AND THIS ONE
MIKE BRENNAN	617-410-9027	mbrennan@nextgenins.com	MA Nicholas Chavez	quorum-mlp-web AUTO, HOME	AUTO, HOME	<input type="radio"/> AND THIS ONE
MITCH BRENNAN	239-555-6280	dat-guy@gmail.com	MA Howard Soto	mylifeprotected-web AUTO, HOME	AUTO, RENTERS	<input type="radio"/> AND THIS ONE
RHODA MARTIN	741-059-4157	boatymcboatface@gmail.com	VT Martha Patel	bradsdeals-mlp-web LIFE	AUTO, HOME	<input type="radio"/> AND THIS ONE
ANNIE RIOS	761-212-4699	adelia_hermann@brain.tv	NY Nicholas Dunn	massdrive-web AUTO, HOME, PET	AUTO	<input type="radio"/> AND THIS ONE
EFFIE SHELTON	505-122-7833	schoen.kaya@hintz.io	LA Edward Thomas	mylifeprotected-web RENTERS	HOME	<input type="radio"/> AND THIS ONE
RONALD INGRAM	238-010-9536	jacobson_ottis@homenick.ca	UT Alexander Brewer	mylifeprotected-web AUTO, RENTERS	PET, LIFE	<input type="radio"/> AND THIS ONE
PAUL MALONE	714-325-1716	rusty.dubuque@hotmail.com	CO Jason Lewis	massdrive-web AUTO, HOME	AUTO, HOME, PET	<input type="radio"/> AND THIS ONE
ANGEL HODGES	596-534-7352	runofsdottir_lempe@erik.net	AK Philip Carroll	quorum-mlp-web RENTERS	RENTERS	<input type="radio"/> AND THIS ONE
GLENN GREER	872-773-8791	marcel.hansen@hotmail.com	CT Megan Cox	mylifeprotected-web HOME	AUTO, RENTERS	<input type="radio"/> AND THIS ONE
KATHARINE MEYER	670-253-3901	tremayne_grady@gmail.com	NV Julia Jacobs	nwtf-mlp-web LIFE	LIFE	<input type="radio"/> AND THIS ONE
BARRY BUSH	899-130-6415	schiller_colt@gmail.com	AR Joan Knight	abz-cbc-mlp-web AUTO, HOME, PET	AUTO	<input type="radio"/> AND THIS ONE
DORA FRENCH	554-603-0557	kub.rory@gmail.com	FL Henry Walsh	abz-cbc-mlp-web RENTERS	HOME	<input type="radio"/> AND THIS ONE
CALVIN RODGERS	961-860-3401	riley.prosacco@reinger.biz	KY Bobby Ward	bradsdeals-mlp-web PET, LIFE	PET, LIFE	<input type="radio"/> AND THIS ONE
MABLE MALONE	233-189-2455	oren.goldner@elva.ca	NJ Jean Torres	mylifeprotected-web AUTO, HOME	HOME, PET	<input type="radio"/> AND THIS ONE
CORY RAMIREZ	199-140-7736	stephen.block@hotmail.com	ND Dorothy Lawson	massdrive-web AUTO	AUTO	<input type="radio"/> AND THIS ONE
<< Prev 1 2 3 4 5 Next >>						
ETHEL SCHULTZ	986-830-1473	boehm_gracie@patricia.org	MA Jordan Gonzalez	mylifeprotected-web HOME	AUTO, RENTERS	<input type="radio"/> AND THIS ONE
BRYAN THOMPSON	589-632-3315	taryn_nolan@botsford.info	AL Gloria Murray	mylifeprotected-web AUTO, HOME, PET	AUTO, HOME, PET	<input type="radio"/> AND THIS ONE
ANNIE RIOS	761-212-4699	adelia_hermann@brain.tv	FL Ronald Chen	massdrive-web RENTERS	AUTO	<input type="radio"/> AND THIS ONE

SELECT THE PRIMARY CONTACT INFORMATION

THE OTHER DATA WILL BECOME SECONDARY INFORMATION

LEAD 1

Michael Brennan

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennster@gmail.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

LEAD 2

Mike Brennan

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennan@nextgenins.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

SELECT WHICH POLICY SHELLS TO KEEP

THE OTHERS BE ARCHIVED

ACTIVE POLICIES

PRODUCT	CARRIER	PARTNER	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
Auto - Bundled	Mapfre	Liberty Affinity	10/13/2018	A261A00000Crpk9	Travis Tummond	<input type="button" value="KEEP"/>
Home - Bundled	Mapfre	MLP Organic	10/13/2018	A365B00000Dmnfyt3	Travis Tummond	<input type="button" value="KEEP"/>

ACTIVE POLICIES

PRODUCT	CARRIER	PARTNER	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
Auto - Bundled	Travelers	Liberty Affinity	10/13/2017	A261A00000Crpk9	Travis Tummond	<input type="button" value="KEEP"/>
Home - Bundled	Travelers	MLP Organic	10/13/2017	A365B00000Dmnfyt3	Travis Tummond	<input type="button" value="KEEP"/>

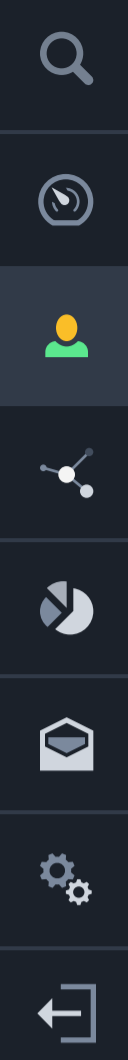
POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★	Pet	Hartville	Liberty Affinity	10/13/2016	Travis Tummond	Sale in process	<input type="button" value="KEEP"/>
★★★★★	Term Life	Securian	MLP Organic	8/15/2016	Travis Tummond	No sale	<input type="button" value="KEEP"/>

POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★	Pet	Hartville	SEIU	10/13/2016	Travis Tummond	No Sale	<input type="button" value="KEEP"/>
★★★★★	Term Life	Securian	Aol	8/15/2016	Travis Tummond	No Sale	<input type="button" value="KEEP"/>

[CANCEL](#)



SELECT THE PRIMARY CONTACT INFORMATION

THE OTHER DATA WILL BECOME SECONDARY INFORMATION

LEAD 1

Michael Brennan

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennster@gmail.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

LEAD 2

Mike Brennan

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennan@nextgenins.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

SELECT WHICH POLICY SHELLS TO KEEP

THE OTHERS BE ARCHIVED

LEAD 1 - ACTIVE POLICIES

PRODUCT	CARRIER	PARTNERS	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
Auto - Bundled	Mapfre	Liberty Affinity	10/13/2018	A261A00000Crpk9	Travis Tummond	<input checked="" type="checkbox"/> KEEP
Home - Bundled	Mapfre	MLP Organic	10/13/2018	A365B00000Dmnfyt3	Travis Tummond	<input checked="" type="checkbox"/> KEEP

LEAD 2 - ACTIVE POLICIES

PRODUCT	CARRIER	PARTNERS	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
Auto - Bundled	Travelers	Liberty Affinity	10/13/2017	A261A00000Crpk9	Travis Tummond	<input type="checkbox"/> KEEP
Home - Bundled	Travelers	MLP Organic	10/13/2017	A365B00000Dmnfyt3	Travis Tummond	<input type="checkbox"/> KEEP

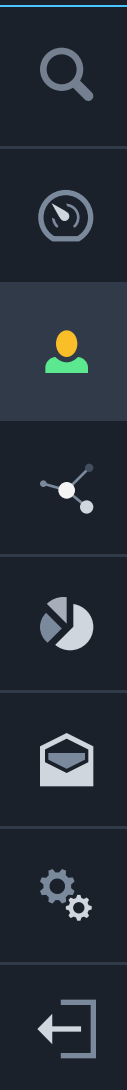
LEAD 1 - POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★	Pet	Hartville	Liberty Affinity	10/13/2016	Travis Tummond	Sale in process	<input type="checkbox"/> KEEP
★☆☆☆☆	Term Life	Securian	MLP Organic	8/15/2016	Travis Tummond	No sale	<input type="checkbox"/> KEEP

LEAD 2 - POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★	Pet	Hartville	SEIU	10/13/2016	Travis Tummond	No Sale	<input checked="" type="checkbox"/> KEEP
★☆☆☆☆	Term Life	Securian	Aol	8/15/2016	Travis Tummond	No Sale	<input checked="" type="checkbox"/> KEEP

[CANCEL](#)



HERE'S THE NEW LEAD DATA

Michael Brennan

(617) 410-9027 - Primary

mbrennster@gmail.com - Primary

19 Grant Avenue

mbrennan@nextgenins.com

East Walpole, MA 02032

ACTIVE POLICIES

PRODUCT	CARRIER	EXPIRATION	EFFECTIVE DATE	POLICY NUMBER	AGENT
Auto - Bundled	Mapfre	10/12/2019	10/13/2018	A261A00000Crpk9	Travis Tummond
Home - Bundled	Mapfre	10/12/2019	10/13/2018	A365B00000Dmnfyt3	Travis Tummond

POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION
★★★★★	Pet	Hartville	SEIU	10/13/2016	Travis Tummond	No Sale
★★★★★	Term Life	Securian	Aol	8/15/2016	Travis Tummond	No Sale

ARCHIVED POLICIES

PRODUCT	CARRIER	PARTNER	QUOTE DATE	DISPOSITION	AGENT
Auto - Bundled	Travelers	Liberty Affinity	10/13/2017	Bound	Travis Tummond
Home - Bundled	Travelers	MLP Organic	10/13/2017	Bound	Travis Tummond
Pet	Hartville	SEIU	10/13/2016	Sale in process	Travis Tummond
Term Life	Securian	Aol	8/15/2016	No sale	Travis Tummond

ARE YOU SURE YOU WANT TO MERGE THESE LEADS?

[CANCEL](#)



MERGE THESE LEADS



SEARCH AGAIN

SEARCH RESULTS FOR: BRENNAN

POLICY TYPE: AUTO HOME RENTERS PET LIFE
 STATUS: WEB START OPEN IN PROCESS BOUND NO SALE

⇄ ENTER MEREGE MODE

NAME	PRIMARY PHONE	EMAIL	ADDRESS	ACTIVE SHELLS	POTENTIAL SHELLS	LEAD DETAILS
				AUTO, HOME	PET, LIFE	VIEW DETAILS
Hank Mc Brennanmen	617-223-4964	patrinut@yahoo.com	2308 Olde Sawmill Boulevard, Dublin, OH 43016	AUTO	AUTO, HOME, PET	VIEW DETAILS
				AUTO, HOME	AUTO, HOME	VIEW DETAILS
				LIFE	AUTO, HOME	VIEW DETAILS
Mitch Brennan	239-555-6280	dat-guy@gmail.com	35 Emerson Gardens Road, Lexington, MA 02145	AUTO, HOME, PET	AUTO	VIEW DETAILS
				RENTERS	HOME	VIEW DETAILS
				AUTO RENTERS	PET, LIFE	VIEW DETAILS
				AUTO, HOME	AUTO, HOME, PET	VIEW DETAILS
Annie Rios	761-212-4699	adelia_hermann@brain.tv	194 Okuneva Road Suite 824 , NY 44424	HOME	RENTERS	VIEW DETAILS
				LIFE	AUTO RENTERS	VIEW DETAILS
				AUTO, HOME, PET	AUTO	VIEW DETAILS
				RENTERS	HOME	VIEW DETAILS
Ronald Ingram	238-010-9536	jacobson_ottis@homenick.ca	27 Millie Viaduct , UT 39054	AUTO, HOME	PET, LIFE	VIEW DETAILS
				AUTO	HOME, PET	VIEW DETAILS
				HOME	AUTO, RENTERS	VIEW DETAILS
Angel Hodges	596-534-7352	runolfsdottir_lempl@erik.net	073 Harber Island Apt. 086 , AK 70575	AUTO, HOME, PET	AUTO	VIEW DETAILS
				RENTERS		VIEW DETAILS
Katharine Meyer	670-253-3901	tremayne_grady@gmail.com	69 Aglae Valleys , NV 95015			VIEW DETAILS
						VIEW DETAILS
Dora French	554-603-0557	kub.rory@gmail.com	418 Alexys Stream Apt. 332 , FL 40989			VIEW DETAILS
						VIEW DETAILS
Mable Malone	233-189-2455	oren.goldner@elva.ca	776 Koss Rapid Suite 650 , NJ 88152			VIEW DETAILS
						VIEW DETAILS
Ethel Schultz	986-830-1473	boehm_gracie@patricia.org	733 Aimee Spur Suite 857 , MA 47746			VIEW DETAILS
						VIEW DETAILS
Annie Rios	761-212-4699	adelia_hermann@brain.tv	194 Okuneva Road Suite 824 , FL 70575			VIEW DETAILS



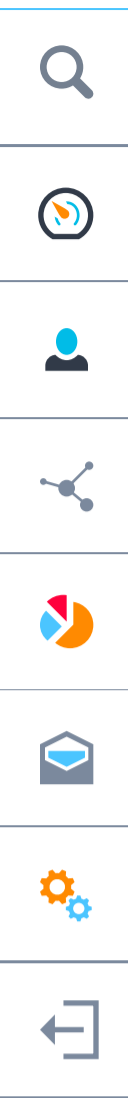
SEARCH AGAIN

SEARCH RESULTS FOR: BRENNAN

CANCEL

MERGE THESE LEADS

NAME	PRIMARY PHONE	EMAIL	ADDRESS	ACTIVE POLICIES	POLICY SHELLS	WHICH LEADS?
				AUTO, HOME	PET, LIFE	<input checked="" type="radio"/> THIS ONE
Hank Mc Brennanmen	617-223-4964	patrinut@yahoo.com	2308 Olde Sawmill Boulevard, Dublin, OH 43016	AUTO	AUTO, HOME, PET	<input type="radio"/> AND THIS ONE
				LIFE	AUTO, HOME	<input type="radio"/> AND THIS ONE
				AUTO, HOME, PET	AUTO RENTERS	<input type="radio"/> AND THIS ONE
Mitch Brennan	239-555-6280	dat-guy@gmail.com	35 Emerson Gardens Road, Lexington, MA 02145	RENTERS	AUTO	<input type="radio"/> AND THIS ONE
				AUTO RENTERS	HOME	<input type="radio"/> AND THIS ONE
				AUTO, HOME	PET, LIFE	<input type="radio"/> AND THIS ONE
Annie Rios	761-212-4699	adelia_hermann@brain.tv	194 Okuneva Road Suite 824 , NY 44424	HOME	RENTERS	<input type="radio"/> AND THIS ONE
				LIFE	AUTO RENTERS	<input type="radio"/> AND THIS ONE
				AUTO, HOME, PET		<input type="radio"/> AND THIS ONE
				RENTERS	AUTO	<input type="radio"/> AND THIS ONE
Ronald Ingram	238-010-9536	jacobson_ottis@homenick.ca	27 Millie Viaduct , UT 39054	AUTO, HOME	PET, LIFE	<input type="radio"/> AND THIS ONE
				AUTO	HOME, PET	<input type="radio"/> AND THIS ONE
				HOME		<input type="radio"/> AND THIS ONE
Angel Hodges	596-534-7352	runofsdottir_jempi@erik.net	073 Harber Island Apt. 086 , AK 70575	AUTO, HOME, PET	AUTO, RENTERS	<input type="radio"/> AND THIS ONE
				RENTERS	AUTO	<input type="radio"/> AND THIS ONE
Katharine Meyer	670-253-3901	tremayne_grady@gmail.com	69 Aglae Valleys , NV 95015			<input type="radio"/> AND THIS ONE
						<input type="radio"/> AND THIS ONE
Dora French	554-603-0557	kub.rory@gmail.com	418 Alexys Stream Apt. 332 , FL 40989			<input type="radio"/> AND THIS ONE
						<input type="radio"/> AND THIS ONE
Mable Malone	233-189-2455	oren.goldner@elva.ca	776 Koss Rapid Suite 650 , NJ 88152			<input type="radio"/> AND THIS ONE
						<input type="radio"/> AND THIS ONE
Ethel Schultz	986-830-1473	boehm_gracie@patricia.org	733 Aimee Spur Suite 857 , MA 47746			<input type="radio"/> AND THIS ONE
						<input type="radio"/> AND THIS ONE
Annie Rios	761-212-4699	adelia_hermann@brain.tv	194 Okuneva Road Suite 824 , FL 70575			<input type="radio"/> AND THIS ONE



SELECT THE PRIMARY CONTACT INFORMATION

THE OTHER DATA WILL BECOME SECONDARY INFORMATION

LEAD 1

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennster@gmail.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

LEAD 2

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennster@gmail.com	19 Grant Avenue, East Walpole, MA 02032
Gender	Residency Type	
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

SELECT WHICH POLICY SHELLS TO KEEP

THE OTHERS BE ARCHIVED

ACTIVE POLICIES

PRODUCT	CARRIER	PARTNER	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
						<input type="button" value="KEEP"/>
Home - Bundled	Mapfre	MLP Organic	10/13/2018	A365B00000Dmnfy13	Travis Tummond	<input type="button" value="KEEP"/>

ACTIVE POLICIES

PRODUCT	CARRIER	PARTNER	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
						<input type="button" value="KEEP"/>
Home - Bundled	Travelers	MLP Organic	10/13/2017	A365B00000Dmnfy13	Travis Tummond	<input type="button" value="KEEP"/>

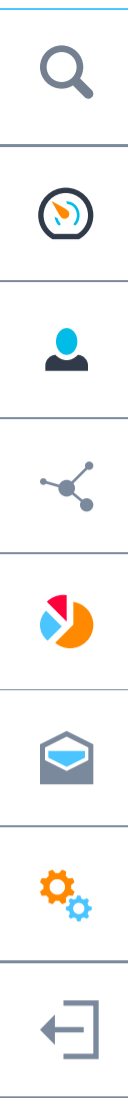
POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★							<input type="button" value="KEEP"/>
★★★★★	Term Life	Securian	MLP Organic	8/15/2016	Travis Tummond	No sale	<input type="button" value="KEEP"/>

POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★							<input type="button" value="KEEP"/>
★★★★★	Term Life	Securian	Aol	8/15/2016	Travis Tummond	No Sale	<input type="button" value="KEEP"/>

[CANCEL](#)



SELECT THE PRIMARY CONTACT INFORMATION

THE OTHER DATA WILL BECOME SECONDARY INFORMATION

LEAD 1

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennster@gmail.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

LEAD 2

Primary Phone	Primary Email	Address
(617) 410-9027	mbrennster@gmail.com	19 Grant Avenue, East Walpole, MA 02032
Birthday	Gender	Residency Type
03/09/1984	Male	Owns Home

MAKE THIS THE PRIMARY

SELECT WHICH POLICY SHELLS TO KEEP

THE OTHERS BE ARCHIVED

LEAD 1 - ACTIVE POLICIES

PRODUCT	CARRIER	PARTNERS	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
						<input checked="" type="checkbox"/> KEEP
Home - Bundled	Mapfre	MLP Organic	10/13/2018	A365B00000Dmnfyt3	Travis Tummond	<input checked="" type="checkbox"/> KEEP

LEAD 2 - ACTIVE POLICIES

PRODUCT	CARRIER	PARTNERS	EFFECTIVE DATE	POLICY NUMBER	AGENT	KEEP IT?
						<input type="checkbox"/> KEEP
Home - Bundled	Travelers	MLP Organic	10/13/2017	A365B00000Dmnfyt3	Travis Tummond	<input checked="" type="checkbox"/> KEEP

LEAD 1 - POTENTIAL POLICIES

GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★							<input type="checkbox"/> KEEP
★★★★★	Term Life	Securian	MLP Organic	8/15/2016	Travis Tummond	No sale	<input checked="" type="checkbox"/> KEEP

LEAD 2 - POTENTIAL POLICIES


GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION	KEEP IT?
★★★★★							<input checked="" type="checkbox"/> KEEP
★★★★★	Term Life	Securian	Aol	8/15/2016	Travis Tummond	No Sale	<input checked="" type="checkbox"/> KEEP

[CANCEL](#)

REVIEW MERGED LEAD

HERE'S THE NEW LEAD DATA

Michael Brennan

 (617) 410-9027 - Primary

 mbrennster@gmail.com - Primary

 19 Grant Avenue

 mbrennan@nextgenins.com

East Walpole, MA 02032

ACTIVE POLICIES					
PRODUCT	CARRIER	EXPIRATION	EFFECTIVE DATE	POLICY NUMBER	AGENT
Home - Bundled	Mapfre	10/12/2019	10/13/2018	A365B00000Dmnfyt3	Travis Tummond

POTENTIAL POLICIES						
GUT FEELING	PRODUCT	CARRIER	PARTNER	QUOTE DATE	AGENT	DISPOSITION
★★★★★						
★★★★★	Term Life	Securian	Aol	8/15/2016	Travis Tummond	No Sale

ARCHIVED POLICIES					
PRODUCT	CARRIER	PARTNER	QUOTE DATE	DISPOSITION	AGENT
Home - Bundled	Travelers	MLP Organic	10/13/2017	Bound	Travis Tummond
Term Life	Securian	Aol	8/15/2016	No sale	Travis Tummond

ARE YOU SURE YOU WANT TO MERGE THESE LEADS?

[CANCEL](#)



MERGE THESE LEADS

MICHAEL BRENNAN

🚫 DO NOT CONTACT

[EDIT CONTACT PREFERENCES](#)

📞 (617) 410-9027

✉️ mbrennster@gmail.com

🏠 123 Maine Street
East Walpole, MA 02032

🗣️ Language: English

ACTIVE POLICIES

[ADD A BOUND POLICY](#)

PRODUCT	CARRIER	REFCODE	EFFECTIVE	EXPIRATION	POLICY #	AGENT
AUTOP	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBJOD	Travis Tummond
HOME	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBHVR	Travis Tummond

POTENTIAL POLICIES

[ADD A NEW POLICY](#)

PRODUCT	GUT FEELING	REFCODE	LAST UPDATE	STATUS DISPOSITION	AGENT	CRUSH IT
AUTOP	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	New Lead Quoted Online UPDATE	Travis Tummond	CRUSH IT BUNDLE IT
HOME	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	Sale In Process Preliminary Quote UPDATE	Travis Tummond	CRUSH IT BUNDLE IT

EMAIL COMMUNICATIONS

[SEND AN EMAIL](#)

SUBJECT	SEND DATE	TO EMAIL ADDRESS	STATUS	TYPE	VIEW
📧 Thanks for getting a quote	9/27/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
📧 Just need a few more pieces of info	9/28/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
Thanks	9/28/2018	mbrennster@gmail.com	Sent	Automated	SHOW ME
Your up coming renewal	8/28/2019	mbrennster@gmail.com	Sent	Automated	CANCEL

PHONE CALLS

[SCHEDULE A CALL](#)

TYPE	DATE	TIME	LENGTH	FROM	TO	CAMPAIGN	DISPOSITION	AGENT	LISTEN
In Bound	2/16/17	4:41P	2:45	(216) 716-5921	(617) 410-9027	Nationwide - MLP - Inbound	No Sale - Not Quoted	Kendell Walton	▶ 00:00 <div style="width: 100%;"></div> 10:03 ↓
Out Bound	5/24/16	9:32A	4:53	(617) 532-3934	(617) 910-6168	abrode@bindable.com	New Lead: No Answer or Left Voicemail	Avery Brode	▶ 00:00 <div style="width: 100%;"></div> 3:03 ↓
Out Bound	5/20/16	12:06P	10:23	(508) 287-8153	(617) 910-6168	MD Retail	No Sale - Quoted	Travis Tummond	▶ 00:00 <div style="width: 100%;"></div> 5:14 ↓

NEW NOTE

[ADD NOTE](#)

HISTORY

Only Show Everything ▼

DATE TIME	WHO	TYPE	DETAILS
8/2/2017 4:09P	CL	Data	Parent Lead Source from MyLifeProtected to bbva
8/2/2017 4:09P	CL	Data	Lead Source from Inbound to WebDirect
8/2/2017 4:09P	CL	Data	Referral Code from mylifeprotected-inbound to bbva-mlp-web
8/2/2017 4:09P	RC	Note	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	4K	Event	Policy Bound
8/2/2017 2:52P	RC	Data	Quote Type from Auto to Bundle
8/2/2017 2:52P	RC	Status	Bound.
8/2/2017 2:52P	4K	Agent	Manager from Travis Tummond to Reggie Charles
8/2/2017 2:52P	4K	Event	Homesite Home Shell Created
8/2/2017 2:48P	CL	Note	Morbi commodo, ipsum sed pharetra gravida, orci magna, lectus nunc ullamcorper orci, fermentum bibendum enim nibh eget ipsum. Donec porttitor ligula eu dolor. Maecenas vitae nulla consequat libero cursus venenatis.
8/2/2017 2:48P	CL	Agent	Changed Account Manager from Travis Tummond to No...
8/2/2017 2:48P	TT	Status	Sale in Process - Sent Preliminary Quote.
8/2/2017 2:48P	TT	Note	Nullam sit amet enim. Suspendisse id velit vitae ligula...
8/2/2017 2:47P	CL	Data	Referral Code from bbva-mlp-web to mylifeprotected-inbound
8/2/2017 2:47P	CL	Data	Parent Lead Source from bbva to MyLifeProtected.
8/2/2017 2:47P	4K	Status	New Lead - Crushing.
8/2/2017 2:47P	CL	Data	Lead Source from WebDirect to Inbound.
8/2/2017 2:47P	TT	Data	Home Phone from 9706693576 to 7202189912.
8/2/2017 1:34P	TT	Note	Aliquam erat volutpat. Sed quis velit.
8/2/2017 1:34P	TT	Data	Auto: Mobile to (720) 218-9912.
8/2/2017 10:29A	TT	Status	Auto: Sale in Process - Sent Preliminary Quote.

MICHAEL BRENNAN 🚫 DO NOT CONTACT[EDIT CONTACT PREFERENCES](#)

(617) 410-9027

mbrennster@gmail.com 123 Maine Street
East Walpole, MA 02032

Language: English

ACTIVE POLICIES [ADD A BOUND POLICY](#)

PRODUCT	CARRIER	REFCODE	EFFECTIVE	EXPIRATION	POLICY #	AGENT
AUTOP	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBJOB	Travis Tummond
HOME	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBHVR	Travis Tummond

POTENTIAL POLICIES [ADD A NEW POLICY](#)

PRODUCT	GUT FEELING	REFCODE	LAST UPDATE	STATUS DISPOSITION	AGENT	CRUSH IT
AUTOP	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	New Lead Quoted Online UPDATE	Travis Tummond	CRUSH IT BUNDLE IT
HOME	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	Sale In Process Preliminary Quote UPDATE	Travis Tummond	CRUSH IT BUNDLE IT

EMAIL COMMUNICATIONS [SEND AN EMAIL](#)

SUBJECT	SEND DATE	TO EMAIL ADDRESS	STATUS	TYPE	VIEW
Thanks for getting a quote	9/27/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
Just need a few more pieces of info	9/28/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
Thanks	9/28/2018	mbrennster@gmail.com	Sent	Automated	SHOW ME
Your up coming renewal	8/28/2019	mbrennster@gmail.com	Sent	Automated	CANCEL

PHONE CALLS [SCHEDULE A CALL](#)

DATE	TIME	CALL LENGTH	AGENT	TYPE	PHONE NUMBER	LISTEN
2/16/17	4:41P	2:45	Morgan Thompson	In Bound	(617) 410-9027	LISTEN
5/24/16	9:32A	4:53	Morgan Thompson	Out Bound	(617) 910-6168	LISTEN
5/20/16	12:06P	10:23	Travis Tummonds	Out Bound	(617) 910-6168	LISTEN

PROGRAM DETAILS

Lead Source:	Brad's Deals
Partner:	Brad's Deals - MLP - Web Lead
Notes:	Available Products: Auto, Home, Renters, Umbrella, Pet, Legal, Travel

SCRIPT

“HI BRIANNWQTBMN, I'M CALLING IN REGARDS TO THE QUOTE YOU REQUESTED THROUGH BRAD'S DEALS. MY NAME IS MIKE_ . DO YOU HAVE A FEW MINUTES TO REVIEW YOUR QUOTE INFORMATION?”

Callback number: (888) 423-4215

NEW NOTE

[ADD NOTE](#)

HISTORY Only Show Everything

DATE TIME	WHO	TYPE	DETAILS
8/2/2017 4:09P	CL	Data	Parent Lead Source from MyLifeProtected to bbva
8/2/2017 4:09P	CL	Data	Lead Source from Inbound to WebDirect
8/2/2017 4:09P	CL	Data	Referral Code from mylifeprotected-inbound to bbva-mlp-web
8/2/2017 4:09P	RC	Note	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	4K	Event	Policy Bound
8/2/2017 2:52P	RC	Data	Quote Type from Auto to Bundle
8/2/2017 2:52P	RC	Status	Bound.
8/2/2017 2:52P	4K	Agent	Manager from Travis Tummond to Reggie Charles
8/2/2017 2:52P	4K	Event	Homesite Home Shell Created
8/2/2017 2:48P	CL	Note	Morbi commodo, ipsum sed pharetra gravida, orci magna, lectus nunc ullamcorper orci, fermentum bibendum enim nibh eget ipsum. Donec porttitor ligula eu dolor. Maecenas vitae nulla consequat libero cursus venenatis.
8/2/2017 2:48P	CL	Agent	Changed Account Manager from Travis Tummond to No...
8/2/2017 2:48P	TT	Status	Sale in Process - Sent Preliminary Quote.
8/2/2017 2:48P	TT	Note	Nullam sit amet enim. Suspendisse id velit vitae ligula...
8/2/2017 2:47P	CL	Data	Referral Code from bbva-mlp-web to mylifeprotected-inbound
8/2/2017 2:47P	CL	Data	Parent Lead Source from bbva to MyLifeProtected.
8/2/2017 2:47P	4K	Status	New Lead - Crushing.
8/2/2017 2:47P	CL	Data	Lead Source from WebDirect to Inbound.
8/2/2017 2:47P	TT	Data	Home Phone from 9706693576 to 7202189912.
8/2/2017 1:34P	TT	Note	Aliquam erat volutpat. Sed quis velit.
8/2/2017 1:34P	TT	Data	Auto: Mobile to (720) 218-9912.
8/2/2017 10:29A	TT	Status	Auto: Sale in Process - Sent Preliminary Quote.

MICHAEL BRENNAN

🚫 DO NOT CONTACT

[EDIT CONTACT PREFERENCES](#)

📞 (617) 410-9027

✉️ mbrennster@gmail.com

🏠 123 Maine Street
East Walpole, MA 02032

🗣️ Language: English

ACTIVE POLICIES

[ADD A BOUND POLICY](#)

PRODUCT	CARRIER	REFCODE	EFFECTIVE	EXPIRATION	POLICY #	AGENT
AUTOP	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBJOD	Travis Tummond
HOME	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBHVR	Travis Tummond

POTENTIAL POLICIES

[TRANSFER](#) | [ADD A NEW POLICY](#)

PRODUCT	GUT FEELING	REFCODE	LAST UPDATE	STATUS DISPOSITION	AGENT	CRUSH IT
AUTOP	★★★★☆	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	New Lead Quoted Online UPDATE	Travis Tummond	CRUSH IT BUNDLE IT
HOME	★★★★☆	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	Sale In Process Preliminary Quote UPDATE	Travis Tummond	CRUSH IT BUNDLE IT

EMAIL COMMUNICATIONS

[SEND AN EMAIL](#)

SUBJECT	SEND DATE	TO EMAIL ADDRESS	STATUS	TYPE	VIEW
📧 Thanks for getting a quote	9/27/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
📧 Just need a few more pieces of info	9/28/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
Thanks	9/28/2018	mbrennster@gmail.com	Sent	Automated	SHOW ME
Your up coming renewal	8/28/2019	mbrennster@gmail.com	Sent	Automated	CANCEL

PHONE CALLS

[SCHEDULE A CALL](#)

TYPE	DATE	TIME	LENGTH	FROM	TO	CAMPAIGN	DISPOSITION	AGENT
In Bound	2/16/17	4:41P	2:45	(216) 716-5921	(617) 410-9027	Nationwide - MLP - Inbound	No Sale - Not Quoted	Kendell Walton
Out Bound	5/24/16	9:32A	4:53	(617) 532-3934	(617) 910-6168	abrode@bindable.com	New Lead: No Answer or Left Voicemail	Avery Brode
Out Bound	5/20/16	12:06P	10:23	(508) 287-8153	(617) 910-6168	MD Retail	No Sale - Quoted	Travis Tummond

NEW NOTE

[ADD NOTE](#)

HISTORY

Only Show Notes

DATE TIME	WHO	TYPE	DETAILS
8/2/2017 4:09P	RC	Note	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	RC	Note	Bound.
8/2/2017 2:48P	CL	Note	Morbi commodo, ipsum sed pharetra gravida...

[CLOSE](#)

TRANSFER LEAD TO ANOTHER ACCOUNT

WHICH POTENTIAL POLICIES DO YOU WANT TO TRANSFER?

PRODUCT	GUT FEELING	REFCODE	LAST UPDATE	STATUS DISPOSITION	AGENT	TRANSFER IT
AUTOP	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	New Lead Quoted Online	Travis Tummond	<input type="radio"/> THIS ONE
HOME	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	Sale In Process Preliminary Quote	Travis Tummond	<input type="radio"/> THIS ONE

ANYTHING YOU WANT TO TELL THE NEXT AGENT ABOUT THIS LEAD?

NOTE

WHICH ACCOUNT DO YOU WANT TO TRANSFER TO?

ACCOUNT ▼

TRANSFER THIS LEAD

[CLOSE](#)

TRANSFER LEAD TO ANOTHER ACCOUNT

WHICH POTENTIAL POLICIES DO YOU WANT TO TRANSFER?

PRODUCT	GUT FEELING	REFCODE	LAST UPDATE	STATUS DISPOSITION	AGENT	TRANSFER IT
AUTOP	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	New Lead Quoted Online	Travis Tummond	<input type="radio"/> THIS ONE
HOME	★★★★★	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	Sale In Process Preliminary Quote	Travis Tummond	<input checked="" type="radio"/> THIS ONE

ANYTHING YOU WANT TO TELL THE NEXT AGENT ABOUT THIS LEAD?

NOTE

They are interested in the Travlrs quote

WHICH ACCOUNT DO YOU WANT TO TRANSFER TO?


ACCOUNT



Other Agency Partner


TRANSFER THIS LEAD

 Policy successfully transfered to Other Agency Partner

MICHAEL BRENNAN

[EDIT CONTACT PREFERENCES](#)
 (617) 410-9027

 mbrennster@gmail.com
 123 Maine Street
East Walpole, MA 02032

 Language: English

ACTIVE POLICIES

[ADD A BOUND POLICY](#)

PRODUCT	CARRIER	REFCODE	EFFECTIVE	EXPIRATION	POLICY #	AGENT
AUTOP	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBKJOD	Travis Tummond
HOME	Mapfre	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	2022-10-12	BQ01VNBHVR	Travis Tummond



POTENTIAL POLICIES

[TRANSFER](#) | [ADD A NEW POLICY](#)

PRODUCT	GUT FEELING	REFCODE	LAST UPDATE	STATUS DISPOSITION	AGENT	CRUSH IT
AUTOP	★★★★☆	BBVA - MLP - Web Leads (bbva-mlp-web)	2021-10-13	New Lead Quoted Online UPDATE	Travis Tummond	CRUSH IT BUNDLE IT

EMAIL COMMUNICATIONS

[SEND AN EMAIL](#)

SUBJECT	SEND DATE	TO EMAIL ADDRESS	STATUS	TYPE	VIEW
 Thanks for getting a quote	9/27/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
 Just need a few more pieces of info	9/28/2018	mbrennster@gmail.com	Sent	Agent	SHOW ME
Thanks	9/28/2018	mbrennster@gmail.com	Sent	Automated	SHOW ME
Your up coming renewal	8/28/2019	mbrennster@gmail.com	Sent	Automated	CANCEL

PHONE CALLS

[SCHEDULE A CALL](#)

DATE	TIME	CALL LENGTH	AGENT	TYPE	PHONE NUMBER	LISTEN
2/16/17	4:41P	2:45	Morgan Thompson	In Bound	(617) 410-9027	LISTEN
5/24/16	9:32A	4:53	Morgan Thompson	Out Bound	(617) 910-6168	LISTEN
5/20/16	12:06P	10:23	Travis Tummonds	Out Bound	(617) 910-6168	LISTEN

TRANSFERRED POLICIES

PRODUCT	TRANSFERRED DATE	TRANSFERRED TO	TRANSFERRED BY	REFCODE	STATUS DISPOSITION
HOME	2021-10-13	Other Agency Partner	Travis Tummond	BBVA - MLP - Web Leads (bbva-mlp-web)	New Lead Quoted Online

NEW NOTE

 [ADD NOTE](#)

HISTORY

DATE TIME	WHO	TYPE	DETAILS
8/2/2017 4:09P	RC	Note	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	RC	Note	Bound.
8/2/2017 2:48P	CL	Note	Morbi commodo, ipsum sed pharetra gravida...

MICHAEL BRENNAN

(617) 410-9027
 Partner: Aol
 Agent: Travis Tummond [UPDATE](#)
mbrennster@gmail.com
 Channel: Web Direct
 Status: Bound Renewal [UPDATE](#)
 19 Grant Avenue
 refCode: Aol-mlp-webpaid [UPDATE](#)
 ★★★★★

CRUSH IT

ACTIVE AUTO POLICY		POLICY NUMBER: A261A00000CRPK9	
Current Carrier:	Liberty Mutual	Property Limit:	250/500
Policy Exp Date:	10/12/2017	Bodily Limit:	250000
Effective Date:	10/13/2016	Uninsured Motorist:	250/500
		Underinsured Motorist:	250/500
		Collision Deductible:	500
		Comprehensive Deductible:	500

DRIVERS						
DRIVER NAME	LICENSE STATUS	LICENSE NUMBER	BIRTHDATE	FIRST LICENSE DATE	SDIP	DETAILS
Michael Brennan	Valid	S22577864	03/09/1984	03/09/2000	99	SHOW ME
Lindsay Brennan	Valid	S41245739	07/03/1982	07/03/1998	4	SHOW ME

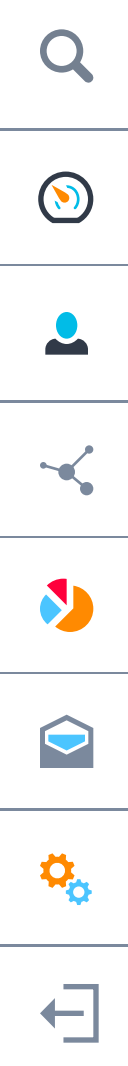
VEHICLES						
YEAR	MAKE	MODEL	VIN	PRIMARY USE	ANNUAL MILEAGE	OWNERSHIP
2017	Toyota	Tundra Double Cab SR/SR5	5TFUM5F16F2483593	To/From Work	10000	Owned
2015	Toyota	Sienna LE	5TDJK3DC3F3483159	To/From Work	4500	Owned

PREVIOUS QUOTES						
DATE	COMPANY	PREMIUM	TERM	BI	DEDUCTIBLE	DETAILS
10/01/2016	Progressive	\$436.25	6 Month	50/100	500	SHOW ME
10/01/2016	Liberty	\$1,254.65	12 Month	100/300	1,000	SHOW ME
10/01/2016	Safeco	Supressed	-	-	-	SHOW ME
10/01/2016	Travelers	Error	-	-	-	SHOW ME

NEW NOTE

ADD NOTE

HISTORY				Only Show Everything
DATE TIME	WHO	TYPE	DETAILS	
8/2/2017 4:09P	CL	Data	Parent Lead Source from MyLifeProtected to bbva	
8/2/2017 4:09P	CL	Data	Lead Source from Inbound to WebDirect	
8/2/2017 4:09P	CL	Data	Referral Code from mylifeprotected-inbound to bbva-mlp-web	
8/2/2017 4:09P	RC	Note	Lorem ipsum dolor sit amet, consectetur adipiscing elit	
8/2/2017 2:52P	4K	Event	Policy Bound	
8/2/2017 2:52P	RC	Data	Quote Type from Auto to Bundle	
8/2/2017 2:52P	RC	Status	Bound.	
8/2/2017 2:52P	4K	Agent	Manager from Travis Tummond to Reggie Charles	
8/2/2017 2:52P	4K	Event	Homesite Home Shell Created	
8/2/2017 2:48P	CL	Note	Morbi commodo, ipsum sed pharetra gravida, orci magna, lectus nunc ullamcorper orci, fermentum bibendum enim nibh eget ipsum. Donec porttitor ligula eu dolor. Maecenas vitae nulla consequat libero cursus venenatis.	
8/2/2017 2:48P	CL	Agent	Changed Account Manager from Travis Tummond to No...	
8/2/2017 2:48P	TT	Status	Sale in Process - Sent Preliminary Quote.	
8/2/2017 2:48P	TT	Note	Nullam sit amet enim. Suspendisse id velit vitae ligula...	
8/2/2017 2:47P	CL	Data	Referral Code from bbva-mlp-web to mylifeprotected-inbound	
8/2/2017 2:47P	CL	Data	Parent Lead Source from bbva to MyLifeProtected.	
8/2/2017 2:47P	4K	Status	New Lead - Crushing.	
8/2/2017 2:47P	CL	Data	Lead Source from WebDirect to Inbound.	
8/2/2017 2:47P	TT	Data	Home Phone from 9706693576 to 7202189912.	
8/2/2017 1:34P	TT	Note	Aliquam erat volutpat. Sed quis velit.	
8/2/2017 1:34P	TT	Data	Auto: Mobile to (720) 218-9912.	
8/2/2017 10:29A	TT	Status	Auto: Sale in Process - Sent Preliminary Quote.	



MICHAEL BRENNAN

[EDIT](#)

📞 (617) 410-9027 - Primary
🏠 19 Grant Avenue
🔗 Partner: Aol
👤 Agent: Travis Tummond
📱 (617) 910-6168
📍 East Walpole, MA 02032
📡 Channel: Web Direct
✅ Status: Bound Renewal
✉️ mbrennster@gmail.com
🗣️ Language: Spanish
📄 refCode: Aol-mlp-webpaid
★ ★ ★ ★ ★

[VIEW POLICY DOCUMENTS](#)

[SEND TO THE POLICY CRUSHER](#)

NEW NOTE

[ADD NOTE](#)

ACTIVE AUTO POLICY POLICY NUMBER: A261A0000CRPK9

Policy Exp Date:	10/12/2017	Bodily Limit:	250000	Collision Deductible:	500
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DRIVERS

DRIVER NAME	LICENSE STATUS	LICENSE NUMBER	BIRTHDATE	FIRST LICENSE DATE	SDIP	DETAILS
Lindsay Brennan	Valid	541245739	07/03/1982	07/03/1998	4	SHOW ME

VEHICLES

YEAR	MAKE	MODEL	TRIM	VIN	DETAILS
2017	Toyota	Tundra Double Cab SR/SR5	Pickup 4 4x4 5.7L L4 DOHC 32V	5TFUM5F16F2483593	SHOW ME
2015	Toyota	Sienna LE	Sports Van AWD 3.5L V6 FI DOHC 24V NF4	5TDJK3DC3F3483159	SHOW ME

Previous Policies and Quotes

PREVIOUS AUTO POLICY POLICY NUMBER: CRPK9

Expiration:	10/12/2016	Bodily Limit:	100000	Collision Deductible:	500
-------------	------------	---------------	--------	-----------------------	-----

PREVIOUS VEHICLES

VEHICLE YEAR	VEHICLE MAKE	VEHICLE MODEL	VEHICLE TRIM	VIN	DETAILS
					SHOW ME

PREVIOUS QUOTES

DATE	COMPANY	PREMIUM	TERM	BI	DEDUCTIBLE	DETAILS
✓ 10/01/2016	Progressive	\$436.25	6 Month	50/100	500	SHOW ME
10/01/2016	Liberty	\$1,254.65	12 Month	100/300	1,000	SHOW ME
10/01/2016	Safeco	Supressed	-	-	-	SHOW ME
10/01/2016	Travelers	Error	-	-	-	SHOW ME

HISTORY Only Show Everything

Date Time	Type	Who	Details
8/2/2017 4:09P	Data	CL	Lead Source from Inbound to WebDirect
8/2/2017 2:52P	Event	4K	Policy Bound
8/2/2017 2:52P	Status	RC	Bound
8/2/2017 2:52P	Event	4K	Homesite Home Shell Created
8/2/2017 2:48P	Status	TT	Sale in Process - Sent Preliminary Quote.
8/2/2017 2:47P	Data	CL	Parent Lead Source from bbva to MyLifeProtected.
8/2/2017 2:47P	Data	CL	Lead Source from WebDirect to Inbound.
8/2/2017 1:34P	Data	TT	Auto: Mobile to (720) 218-9912.
8/2/2017 10:29A	Status	TT	Auto: Sale in Process - Sent Preliminary Quote.

MICHAEL BRENNAN

EDIT

(617) 410-9027 - Primary 19 Grant Avenue Partner: Aol Agent: Travis Tummond
 (617) 910-6168 East Walpole, MA 02032 Channel: Web Direct Status: Bound Renewal
 mbrennster@gmail.com Language: Spanish refCode: Aol-mlp-webpaid ★★★★★

SEND TO THE POLICY CRUSHER

ADD NOTE

LENDER INFORMATION

Lender:	Loan Mart	Submitting Company:	Loan Depot	Loan Officer:	Jim Thomas
Address:	123 Main ST, Suite 400	Address:	245 Main ST, Suite 200	Email:	jthomas@loanmart.com
	Boston, MA 02210		Boston, MA 02210	Phone:	825.514.2589

ACTIVE AUTO POLICY

Current Carrier:	Liberty Mutual	Property Limit:	250/500	Underinsured Motorist:	250/500
Policy Exp Date:	10/12/2017	Bodily Limit:	250000	Collision Deductible:	500
Effective Date:	10/13/2016	Uninsured Motorist:	250/500	Comprehensive Deductible:	500

DRIVERS

DRIVER NAME	LICENSE STATUS	LICENSE NUMBER	BIRTHDATE	FIRST LICENSE DATE	SDIP	DETAILS
Michael Brennan	Valid	S22577864	03/09/1984	03/09/2000	99	SHOW ME
Lindsay Brennan	Valid	S41245739	07/03/1982	07/03/1998	4	SHOW ME

VEHICLES

YEAR	MAKE	MODEL	TRIM	VIN	DETAILS
2017	Toyota	Tundra Double Cab SR/SR5	Pickup 4x4 5.7L L4 DOHC 32V	5TFUM5F16F2483593	SHOW ME
2015	Toyota	Sienna LE	Sports Van AWD 3.5L V6 FI DOHC 24V NF4	5TDJK3DC3F3483159	SHOW ME

PREVIOUS QUOTES

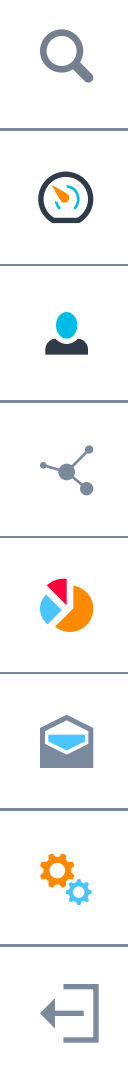
DATE	COMPANY	PREMIUM	TERM	BI	DEDUCTIBLE	DETAILS
10/01/2016	Progressive	\$436.25	6 Month	50/100	500	SHOW ME
10/01/2016	Liberty	\$1,254.65	12 Month	100/300	1,000	SHOW ME
10/01/2016	Safeco	Supressed	—	—	—	SHOW ME
10/01/2016	Travelers	Error	—	—	—	SHOW ME

NEW NOTE

HISTORY

Only Show Everything

Date Time	Type	Who	Details
8/2/2017 4:09P	Data	CL	Parent Lead Source from MyLifeProtected to bbva
8/2/2017 4:09P	Data	CL	Lead Source from Inbound to WebDirect
8/2/2017 4:09P	Data	CL	Referral Code from mylifeprotected-inbound to bbva-mlp-web
8/2/2017 4:09P	Note	RC	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	Event	4K	Policy Bound
8/2/2017 2:52P	Data	RC	Quote Type from Auto to Bundle
8/2/2017 2:52P	Status	RC	Bound.
8/2/2017 2:52P	Agent	4K	Manager from Travis Tummond to Reggie Charles
8/2/2017 2:52P	Event	4K	Homesite Home Shell Created
8/2/2017 2:48P	Note	CL	Morbi commodo, ipsum sed pharetra gravida, orci magna, lectus nunc
8/2/2017 2:48P	Agent	CL	Change of contact information for Michael Brennan
8/2/2017 2:48P	Status	TT	Sale in Process - Sent Preliminary Quote.
8/2/2017 2:48P	Note	TT	Nullam sit amet enim. Suspendisse id velit vitae ligula...
8/2/2017 2:47P	Data	CL	Referral Code from bbva-mlp-web to mylifeprotected-inbound
8/2/2017 2:47P	Data	CL	Parent Lead Source from bbva to MyLifeProtected.
8/2/2017 2:47P	Status	4K	New Lead - Crushing.
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8/2/2017 2:47P	Data	TT	Home Phone from 9706693576 to 7202189912.
8/2/2017 1:34P	Note	TT	Aliquam erat volutpat. Sed quis velit.
8/2/2017 1:34P	Data	TT	Auto: Mobile to (720) 218-9912.
8/2/2017 10:29A	Status	TT	Auto: Sale in Process - Sent Preliminary Quote.



MICHAEL BRENNAN

EDIT

📞 (617) 410-9027 - Primary
🏠 19 Grant Avenue
🔗 Partner: Aol
👤 Agent: Travis Tummond
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📡 Channel: Web Direct
✅ Status: Bound Renewal
✉️ mbrennster@gmail.com
🗣️ Language: Spanish
📄 refCode: Aol-mlp-webpaid
★ ★ ★ ★ ★

📁 VIEW POLICY DOCUMENTS

➔ SEND TO THE POLICY CRUSHER

NEW NOTE

✍️ ADD NOTE

ACTIVE AUTO POLICY		POLICY NUMBER: A261A0000CRPK9	
Policy Exp Date:	10/12/2017	Bodily Limit:	250000
		Collision Deductible:	500

DRIVERS						
DRIVER NAME	LICENSE STATUS	LICENSE NUMBER	BIRTHDATE	FIRST LICENSE DATE	SDIP	DETAILS
						SHOW ME
Lindsay Brennan	Valid	541245739	07/03/1982	07/03/1998	4	SHOW ME

VEHICLES						
YEAR	MAKE	MODEL	TRIM	VIN	DETAILS	
2017	Toyota	Tundra Double Cab SR/SR5	Pickup 4 4x4 5.7L L4 DOHC 32V	5TFUM5F16F2483593	SHOW ME	
2015	Toyota	Sienna LE	Sports Van AWD 3.5L V6 FI DOHC 24V NF4	5TDJK3DC3F3483159	SHOW ME	

Previous Policies and Quotes

PREVIOUS AUTO POLICY		POLICY NUMBER: CRPK9	
Expiration:	10/12/2016	Bodily Limit:	100000
		Collision Deductible:	500

PREVIOUS VEHICLES					
VEHICLE YEAR	VEHICLE MAKE	VEHICLE MODEL	VEHICLE TRIM	VIN	DETAILS
					SHOW ME

PREVIOUS QUOTES						
DATE	COMPANY	PREMIUM	TERM	BI	DEDUCTIBLE	DETAILS
✓ 10/01/2016	Progressive	\$436.25	6 Month	50/100	500	SHOW ME
10/01/2016	Liberty	\$1,254.65	12 Month	100/300	1,000	SHOW ME
10/01/2016	Safeco	Supressed	-	-	-	SHOW ME
10/01/2016	Travelers	Error	-	-	-	SHOW ME

HISTORY			
Date Time	Type	Who	Details
8/2/2017 4:09P	Data	CL	Lead Source from Inbound to WebDirect
8/2/2017 2:52P	Event	4K	Policy Bound
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8/2/2017 2:48P	Status	TT	Sale in Process - Sent Preliminary Quote.
8/2/2017 2:47P	Data	CL	Parent Lead Source from bbva to MyLifeProtected.
8/2/2017 2:47P	Data	CL	Lead Source from WebDirect to Inbound.
8/2/2017 1:34P	Data	TT	Auto: Mobile to (720) 218-9912.
8/2/2017 10:29A	Status	TT	Auto: Sale in Process - Sent Preliminary Quote.

PRE-FILL PROGRAM

Read to the lead:

“Do you give consent nulla facilisi. In vel sem. Morbi id urna in diam dignissim feugiat. Proin molestie tortor eu velit. Aliquam erat volutpat. Nullam ultrices, diam tempus vulputate egestas, eros pede varius leo, sed imperdiet lectus est ornare odio. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Proin consectetur velit in dui.”

LEAD HAD GRANTED CONSENT

LEAD INFORMATION

FIRST NAME Mike	LAST NAME Brennan	PHONE NUMBER 6172234964	PHONE TYPE Mobile	EMAIL ADDRESS mbrennster@gmail.com	
HOME ADDRESS 19 Grant Ave	ADDRESS 2	HOME ZIP CODE 02032	BIRTH MONTH 03 - March	BIRTH DAY 9	BIRTH YEAR 1984

LEAD MATCHING - 1 CLOSE MATCH, 5 POSSIBLE

Mike Brennan	Primary Phone: 202-555-0134	Email Address: mbrennster@gmail.com	Address: 19 Grant Avenue, East Walpole, MA 02032	THIS LEAD	
★★★★★	Auto	Status: Sale in Process - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017
★★★★★	Home	Status: Sale in Process - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017
Steve McMastersonsmithfield	Primary Phone: 617-223-4964	Email Address: patrinut@yahoo.com	Address: 2308 Olde Sawmill Boulevard, Dublin, OH 43016	THIS LEAD	
★★★★★	Auto	Status: Sale in Process - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017
★★★★★	Mike Brennan	Primary Phone: 202-555-0168	Email Address: mbrennster@gmail.com	Address: 241 A Street, Suite 400, Boston, MA 02110	Last Update: 12/04/2017
★★★★★	Pet	Status: Quote Sent - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017
★★★★★	Mike Brennan	Primary Phone: 202-555-0163	Email Address: dat-guy@gmail.com	Address: 35 Emerson Gardens Road, Lexington, MA 02145	Last Update: 12/04/2017
★★★★★	Renters	Status: Quote Sent - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017
★★★★★	Mike Brennan	Primary Phone: 202-555-0116	Email Address: hantupheaffae@gmail.com	Address: 22 Main Street, Anytown, VT 63599	Last Update: 12/04/2017
★★★★★	Auto	Status: Sale in Process - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017
★★★★★	Renters	Status: Sale in Process - Bindable Quote	Partner: MyLifeProtected	Agent: Jeff Shea	Last Update: 12/04/2017

INSURANCE TYPES

AUTO INSURANCE
 HOMEOWNERS INSURANCE
 PET INSURANCE
 LIFE INSURANCE

 **CRUSH THIS POLICY**

PROGRAM DEETS

CHANGE REFCODE

Parent Lead Source:	Web In-Bound
Referral Code:	Northeastern University Alumni Association-Inbound
Lead Carrier:	Liberty Mutual then Safeco

Notes:
This is the Liberty Affinity program, the Liberty quote should be presented first with every attempt make to close that policy. Next carrier would be Safeco, only then should we present the user with the other carrier options.

SCRIPT

“Thank you for calling the Northeastern University Alumni insurance benefits Program, a partnership with Liberty Mutual Insurance. My name is Travis, how may I help you with your insurance needs today?”

Liberty Affintiy Partner - Code: 9999


Address as Alumni

CLOSE

SEARCH FOR A NEW REFCODE

 SEARCH
abco-mlp-inbound

- abco-mlp-inbound**
- abco-mlp-web
- abco-mlp-wt
- acquín
- ama-mlp-inbound
- ama-mlp-web
- ama-mlp-wt
- anfsp-mlp-inbound
- anfsp-mlp-web
- anthro-mlp-inbound

 CHANGE REFCODE TO ABCO-MLP-INBOUND

LEAD INFORMATION

FIRST NAME: Mike, LAST NAME: Brennan, HOME PHONE NUMBER: (617) 223-4964, MOBILE PHONE NUMBER, EMAIL ADDRESS: mbrennster@gmail.com

HOME ADDRESS: 19 Grant Ave, ADDRESS 2, HOME ZIP CODE: 02032, East Walpole, MA

AUTO: 2 DRIVERS

DRIVER PRE-FILL IS AVAILABLE FOR THIS PROGRAM, DO YOU WANT TO RUN IT? RUN DRIVER PRE-FILL

Driver 1

Driver 1 form: FIRST NAME: Michael, LAST NAME: Brennan, BIRTH MONTH: 03 - March, BIRTH DAY: 9, BIRTH YEAR: 1984, GENDER: Male, MARITAL STATUS: Married, LICENSE NUMBER (OPTIONAL), CURRENT LICENSE STATE: MA, AGE FIRST LICENSED: 16, EDUCATION LEVEL: Some College - No Degree, INDUSTRY / EMPLOYMENT STATUS: Art/Design/Media, CURRENT OCCUPATION: Designer

Driver 2

Driver 2 form: FIRST NAME: Lindsay, LAST NAME: Brennan, BIRTH MONTH: 07 - July, BIRTH DAY: 3, BIRTH YEAR: 1982, GENDER: Female, MARITAL STATUS: Married, LICENSE NUMBER (OPTIONAL), CURRENT LICENSE STATE: MA, AGE FIRST LICENSED: 16, EDUCATION LEVEL: Maters Degree, INDUSTRY / EMPLOYMENT STATUS: Medical/Social Services/Religion, CURRENT OCCUPATION: Therapist

ADD ANOTHER DRIVER

AUTO: 2 CARS

Vehicle 1

Vehicle 1 form: YEAR: 2015, MAKE: TOYOTA, MODEL: TUNDRA DOUBLE CAB SR/SR5, TRIM: Pickup 4 4x4 4.6L L4 DOHC 32V, VIN: 5TFUM5F16F111111, COST OF THE VEHICLE WHEN IT WAS NEW?: 36000, ANNUAL MILEAGE: 12000, CURRENT ODOMETER READING: 30000, WHO'S THE PRIMARY DRIVER?: Mike Brennan, DO YOU OWN THIS VEHICLE?: Owned - Original Owner, HOW LONG HAVE YOU HAD THIS VEHICLE?: Between 1 Year and 2 Years

Is there currently existing damage to this vehicle?

YES NO (selected)

Vehicle 2

Vehicle 2 form: YEAR: 1998, MAKE: HONDA, MODEL: CIVIC LX, TRIM: SEDAN 4 Front 1.6L SOHC 16V, VIN: 5TFUM5F16F111111, COST OF THE VEHICLE WHEN IT WAS NEW?: 36000, ANNUAL MILEAGE: 12000, CURRENT ODOMETER READING: 30000, WHO'S THE PRIMARY DRIVER?: Mike Brennan, DO YOU OWN THIS VEHICLE?: Owned - Original Owner, HOW LONG HAVE YOU HAD THIS VEHICLE?: Between 1 Year and 2 Years

IS THERE CURRENTLY EXISTING DAMAGE TO THIS VEHICLE? No

ADD ANOTHER VEHICLE

AUTO: INCIDENTS

Incident form: WHAT TYPE OF INCIDENT WAS IT: At Fault With No Injury, AMOUNT OF PROPERTY DAMAGE, AMOUNT OF BODILY INJURY, WHO WAS DRIVING?, WHAT WERE THEY DRIVING?, INCIDENT MONTH, INCIDENT DATE, INCIDENT YEAR, ADD AN INCIDENT

AUTO: STATE QUESTIONS

Do you currently have auto insurance?

HAS INSURANCE (selected) NO INSURANCE, WHO IS YOUR CURRENT AUTO INSURANCE COMPANY?: MAPFRE, HOW LONG HAVE YOU BEEN WITH MAPFRE?: 15+ Years

Are you member of an auto club like AAA?

YES (selected) NO, DO YOU OWN OR RENT YOUR RESIDENCE?: I own a home, HOW LONG HAVE YOU LIVED AT YOUR CURRENT RESIDENCE?

When would you like your policy to start?

Calendar view for MARCH 2017 and APRIL 2017, highlighting the 10th of March.

AUTO: COVERAGE

MINPLUS STANDARD (selected) PREMIUM, Coverage By Vehicle, State Coverages

Coverages

Coverage options: PREVIOUS BODILY INJURY: 100/300, BODILY INJURY: 100/300, PROPERTY DAMAGE: \$100,000, MEDICAL PAYMENTS: None, UNDERINSURED MOTORIST: 100/300, UNINSURED MOTORIST: 100/300, COLLISION DEDUCTIBLE: \$500, COMPREHENSIVE DEDUCTIBLE: \$500, TOWING: \$100, SUBSTITUTE TRANSPORTATION: 15/450

QUOTE ME BRO

PROGRAM DEETS

Lead Source: Brad's Deals

Partner: Brad's Deals - MLP - Web Lead

Notes: Available Products: Auto, Home, Renters, Umbrella, Pet, Legal, Travel

SCRIPT

"HI BRIANNWQTBMN, I'M CALLING IN REGARDS TO THE QUOTE YOU REQUESTED THROUGH BRAD'S DEALS. MY NAME IS MIKE. DO YOU HAVE A FEW MINUTES TO REVIEW YOUR QUOTE INFORMATION?"

Callback number: (888) 423-4215

LEAD DETAILS

SCHEDULE A CALL BACK VIEW ON EZLYNX

Mike Brennan

Canopy data

mbrennster@gmail.com

(617) 223-4964

19 Grant Ave, East Walpole, MA 02032

(617) 223-4964

LOCAL WEATHER AND TIME

East Walpole, MA 45° 12:35 pm

LOCAL HEADLINES

- Terrible thing, Terrible thing, Terrible thing, Terrible thing, Terrible thing

BUNDLE & CROSS-SELL

Table with columns: Product, Status, Action (CRUSH IT). Rows include Personal Umbrella, Flood, Pet, Travel, Legal, Home Warranty.

AVAILABLE CARRIERS

Table with columns: Carrier, Products, RTQ, Quotes. Rows include Liberty, Safeco, Progressive, Travelers, Metlife.

CUSTOMER HISTORY

Table with columns: Date, Type, Status, Description. Rows show various customer interactions from 8/2/2017.

BOOK A CALL BACK WITH THIS MIKE BRENNAN CHARACTER



OCTOBER

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Customer Time (MTS)

HOUR: 12 MINUTE: 15 PM

Your Time (ES)

HOUR: 2 MINUTE: 15 PM

TUESDAY OCTOBER 11TH, AT 12:15 PM

LET'S CHAT THEN

AMOUNT OF PROPERTY DAMAGE

AMOUNT OF BODILY INJURY

WHO WAS DRIVING?

WHAT WERE THEY DRIVING?

INCIDENT MONTH

INCIDENT DATE

INCIDENT YEAR

ADD AN INCIDENT

AUTO: STATE QUESTIONS

Do you currently have auto insurance?

HAS INSURANCE NO INSURANCE

WHO IS YOUR CURRENT AUTO INSURANCE COMPANY? MAPFRE

HOW LONG HAVE YOU BEEN WITH MAPFRE? 15+ Years

Are you member of an auto club like AAA?

YES NO

DO YOU OWN OR RENT YOUR RESIDENCE? I own a home

HOW LONG HAVE YOU LIVED AT YOUR CURRENT RESIDENCE?

When would you like your policy to start?

MARCH 2017 APRIL 2017

SU	MO	TU	WE	TH	FR	SA
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	
						1
						2
						3
						4
						5
						6
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						22
						23
						24
						25
						26
						27
						28
						29
						30

AUTO: COVERAGE

MINPLUS STANDARD PREMIUM

Coverage By Vehicle State Coverages

Coverages

PREVIOUS BODILY INJURY 100/300

BODILY INJURY 100/300

PROPERTY DAMAGE \$100,000

MEDICAL PAYMENTS None

UNDERINSURED MOTORIST 100/300

UNINSURED MOTORIST 100/300

COLLISION DEDUCTIBLE \$500

COMPREHENSIVE DEDUCTIBLE \$500

TOWING \$100

SUBSTITUTE TRANSPORTATION 15/450

QUOTE ME BRO

8/2/2017 4:09P	Data	CL	Lead Source from Inbound...
8/2/2017 4:09P	Data	CL	Referral Code from ...
8/2/2017 4:09P	Note	RC	Lorem ipsum dolor sit amet...
8/2/2017 2:52P	Event	4K	Policy Bound
8/2/2017 2:52P	Data	RC	Quote Type from Auto to Bundle
8/2/2017 2:52P	Status	RC	Bound.
8/2/2017 2:52P	Agent	4K	Manager from Travis ...
8/2/2017 2:52P	Event	4K	Homesite Home Shell Created
8/2/2017 2:48P	Note	CL	Morbi commodo, ipsum...

There is data on the long form, maybe you should check it out. [GO TO THE LONG FORM](#)

LEAD INFORMATION

FIRST NAME: Mike, LAST NAME: Brennan, PHONE NUMBER: (617) 223-4964, MOBILE PHONE NUMBER: Mobile, EMAIL ADDRESS: mbrennster@gmail.com

BIRTH MONTH: March, BIRTH DAY: 9, BIRTH YEAR: 1984, MARITAL STATUS: Married

SPOUSE INFORMATION

FIRST NAME: Mike, LAST NAME: Brennan, BIRTH MONTH: March, BIRTH DAY: 9, BIRTH YEAR: 1984

HOME: ADDRESS

HOME ADDRESS: 19 Grant Ave, ADDRESS 2: East Walpole, MA 02032, CHANGE ZIP CODE, I DON'T LIVE AT THIS ADDRESS

HOME: DETAILS

RESIDENCE TYPE: Home, YEAR BUILT: 1952, SQUARE FOOTAGE: 1400, NUMBER OF STORIES: 2

NUMBER OF FULL BATHS: 2, NUMBER OF 3/4 BATHS: 0, NUMBER OF 1/2 BATHS: 1

HOME: PET

DO YOU HAVE ANY DOGS?: Yes, HAS ANY DOG, REGARDLESS OF BREED, EVER BITTEN SOMEONE?: No

DO YOU YOU HAVE ANY OF THESE BREEDS?

Grid of breed selection buttons: AKITA, AMERICAN STAFFORDSHIRE TERRIER, BULL TERRIER, CHOW, DINGO, DOBERMAN PINSCHER, GERMAN SHEPARD, HUSKY, ITALIAN MASTIFF (AKA CANE CORSO), MALAMUTE, PIT BULL, PRESA CANARIO, ROTTWEILER, WOLF, WOLF HYBRID, NONE OF THESE

HOME: DETAILS

NUMBER OF CLAIMS (NOT SUBMITTED TO THE CARRIERS): 0, WHAT IS THE SHAPE OF YOUR ROOF?: Gabel, WHEN WAS YOUR ROOF LAST UPDATED?: 2017

HOME: COVERAGE

REBUILD COST: 99000, PERSONAL PROPERTY COVERAGE: 100000, PERSONAL LIABILITY COVERAGE: \$500,000, COVERAGE B: 10% of Rebuild Cost, DEDUCTIBLE: \$1,000, MEDICAL PAYMENTS: \$5,000, COVERAGE D: 20% of Rebuild Cost

HOME: LONG FORM

TO PROVIDE A MORE ACCURATE QUOTE, WE USE THE INFORMATION YOU HAVE GIVEN AND OTHER CONSUMER REPORTS. BASED ON STATE REGULATIONS, THIS MAY INCLUDE YOUR INSURANCE HISTORY AND/OR CREDIT-BASED INSURANCE SCORE. IN REQUESTING A QUOTE YOU ACKNOWLEDGE AND AGREE THIS INFORMATION WILL BE REVIEWED.

I AGREE

RUN QUOTES

SAFECO

SWYFFT

HIPPO

PROGRAM DEETS

Parent Lead Source: Web In-Bound, Referral Code: Northeastern University Alumni Association- Inbound, Lead Carrier: Liberty Mutual then Safeco

SCRIPT

"Thank you for calling the Northeastern University Alumni insurance benefits Program, a partnership with Liberty Mutual Insurance. My name is Travis, how may I help you with your insurance needs today?"

Liberty Affintiy Partner - Code: 9999, Address as Alumni

LEAD DEETS

VIEW ON ZILLOW

Mike Brennan, mvreb@ngitest.com, (617) 910-6168, 2308 Olde Sawmill Blvd Dublin OH, 43016

LOCAL DEETS

East Walpole, MA 45°, 12:35 pm

CROSS-SELL OPPORTUNITIES

Home: 4 Questions Left, CRUSH IT, Pet: 7 Questions Left, CRUSH IT

AVAILABLE CARRIERS

Table with columns: Carrier, RTQ, Quotes. Rows: SAFECO, SWYFFT, HIPPO

HISTORY

Table with columns: Date, Type, Status, Description. Rows: 8/2/2017 4:09P Data CL Parent Lead Source from MyLifeProtected to bbva, 8/2/2017 4:09P Data CL Lead Source from Inbound to WebDirect, 8/2/2017 4:09P Data CL Referral Code from mylifeprotected-inbound to bbva-mlp-web, 8/2/2017 4:09P Note RC Lorem ipsum dolor sit amet, consectetuer adipiscing elit, 8/2/2017 2:52P Event 4K Policy Bound, 8/2/2017 2:52P Data RC Quote Type from Auto to Bundle, 8/2/2017 2:52P Status RC Bound., 8/2/2017 2:52P Agent 4K Manager from Travis Tummond to Reggie Charles, 8/2/2017 2:52P Event 4K Homesite Home Shell Created, 8/2/2017 2:48P Note CL Morbi commodo, ipsum sed pharetra gravida, orci magna...

HOW'D IT GO WITH WILLIE HOLMES?

[CLOSE](#)

AUTOP STATUS

STATUS



DISPOSITION



HOME STATUS

STATUS



DISPOSITION



OVERALL COMMENTS



BECOME AGENT OF RECORD



DO NOT CONTACT

NOTE



GO TO THE DASHBOARD



GO THE THE LEAD DETAILS PAGE

HOW'D IT GO WITH WILLIE HOLMES?

[CLOSE](#)

CURRENT STATUS

PRODUCT	GUT FEELING	STATUS	DISPOSITION	CARRIER	AGENT	NO CHANGES?
AUTOP	★★★★★	Sale In Process	Preliminary Quote	Travelers	Travis Tummonds	USE THIS STATUS
HOME	★★★☆☆	Sale In Process	Preliminary Quote	Travelers	Travis Tummonds	USE THIS STATUS

AUTOP STATUS

STATUS

DISPOSITION

HOME STATUS

STATUS

DISPOSITION

OVERALL COMMENTS



BECOME AGENT OF RECORD



DO NOT CONTACT

NOTE



GO TO THE DASHBOARD



GO THE THE LEAD DETAILS PAGE

HOW'D IT GO WITH WILLIE HOLMES?

[CLOSE](#)

CURRENT STATUS

PRODUCT	GUT FEELING	STATUS	DISPOSITION	CARRIER	AGENT	NO CHANGES?
AUTOP	★★★★★	Sale In Process	Preliminary Quote	Travelers	Travis Tummonds	USE THIS STATUS
HOME	★★★☆☆	Sale In Process	Preliminary Quote	Travelers	Travis Tummonds	USE THIS STATUS

AUTOP DISPOSITION

STATUS Bound	DISPOSITION Bound By Agent				
CARRIER Travelers	PREMIUM 1452	TERM 12 Month	POLICY NUMBER 435435434DF	EFFECTIVE DATE 2021-04-30	EXPIRATION DATE 2022-04-29

HOME DISPOSITION

STATUS Sale In Process	DISPOSITION Preliminary Quote
CARRIER Travelers	GUT FEELING ★★★★★

OVERALL COMMENTS

<input checked="" type="checkbox"/> BECOME AGENT OF RECORD	<input type="checkbox"/> DO NOT CONTACT
NOTE	
GO TO THE DASHBOARD	GO TO THE LEAD DETAILS PAGE

LEAD INFORMATION
AUTO: DRIVER INFO
AUTO: CARS INFO
AUTO: INCIDENTS
AUTO: STATE QUESTIONS
AUTO: COVERAGES
HOMEOWNERS: PROPERTY INFO
HOMEOWNERS: UPDATES
HOMEOWNERS: EXTRAS
HOMEOWNERS: QUESTIONS
HOMEOWNERS: COVEAGE

RUN QUOTES

USER SELECTED AUTO AND HOME LIBERTY - AUTO AND HOME BUNDLES QUOTE FRESHNESS: JUST RUN

AUTO: \$1,254.65 HOME: \$954.54 TOTAL: \$2,209.19

AUTO QUOTE

PREMIUM	NOTES	QUOTED AUTO COVERAGES
<p>\$104.55 11 PAY</p> <p>\$104.55 DOWN PAYMENT</p> <p>TERM: 12-MONTH POLICY</p>	<p>\$1,254.65 PAID IN FULL</p> <p>Quote Number: 5785458</p>	<p>RPV: Y OEM: N UM: 250/500</p> <p>RREIM: 50/1500 COLL: 500 UNDUM: 250/500</p> <p>TL: EAP BI: 250/500 MEDPM: 5000</p> <p>COMP: 500 PD: 100000 UMPD: REJ</p>

HOME QUOTE

PREMIUM	NOTES	QUOTED HOME COVERAGES
<p>\$954.54</p> <p>TERM: 12-MONTH POLICY</p>	<p>MEDICAL: 5000</p> <p> COMPREHENSIVE DEDUCTIBLE: 1000</p> <p>MEDICAL: 5000</p>	<p>PROPERTY: 100</p> <p>TERM: 12-MONTH POLICY</p> <p>PROPERTY: 100</p>

GOTO LIBERTY TO BIND

PROGRESSIVE - AUTO ONLY QUOTE FRESHNESS: JUST RUN

PREMIUM	NOTES	QUOTED AUTO COVERAGES
<p>\$152.45 MONTHLY - 6 PAYMENTS; 25% DOWN</p> <p>TERM: 6-MONTH POLICY</p>	<p>\$240.75 DOWN PAYMENT</p> <p>\$772.00 PAID IN FULL</p> <p>Quote Number: 1515322</p>	<p>RPV: Y OEM: N UM: 250/500</p> <p>RREIM: 50/1500 COLL: 500 UNDUM: 250/500</p> <p>TL: EAP BI: 250/500 MEDPM: 5000</p> <p>COMP: 500 PD: 100000 UMPD: REJ</p>

GOTO PROGRESSIVE TO BIND

TRAVELERS - AUTO AND HOME BUNDLES QUOTE FRESHNESS: JUST RUN

AUTO: \$1,524.65 (2 6-MONTH POLICIES) HOME: ERROR TOTAL ANNUAL PREMIUM: -

AUTO QUOTE

PREMIUM	NOTES	QUOTED AUTO COVERAGES
<p>\$76.08 MONTHLY - MONTHLY</p> <p>\$76.05 DOWN PAYMENT</p> <p>TERM: 6-MONTH POLICY</p>	<p>\$831.00 PAID IN FULL</p> <p>Quote Number: 1515322</p>	<p>RPV: Y OEM: N UM: 250/500</p> <p>RREIM: 50/1500 COLL: 500 UNDUM: 250/500</p> <p>TL: EAP BI: 250/500 MEDPM: 5000</p> <p>COMP: 500 PD: 100000 UMPD: REJ</p>

HOME QUOTE

TRAVELERS HATES YOUR HOUSE

GOTO TRAVELERS TO BIND

SAFECO - SUPPRESSED

SAFECO WON'T QUOTE A DRIVER WITH LESS THAN 5 YEARS EXPERIENCE.

RUN IT ANYWAY

PROGRAM DEETS

PARENT LEAD SOURCE: Web In-Bound

REFERRAL CODE: Liberty Affinity- Northeastern University Alumni Association-Inbound

LEAD CARRIER: Liberty Mutual then Safeco

Notes:
This is the Liberty Affinity program, the Liberty quote should be presented first with every attempt make to close that policy. Next carrier would be Safeco, only then should we present the user with the other carrier options.

SCRIPT

“Thank you for calling the Northeastern University Alumni insurance benefits Program, a partnership with Liberty Mutual Insurance. My name is Travis, how may I help you with your insurance needs today?”

Liberty Affintiy Partner - Code: 9999

Address as Alumni

LOCAL DEETS

East Walpole, MA 45° 12:35 pm

AVAILABLE CARRIERS

CARRIER	PRODUCTS	QUOTING	RESPONSE
Liberty	AUTO/HOME	OFF <input checked="" type="checkbox"/> ON	AUTO: \$104.55/MONTH HOME: \$954.54
Safeco	AUTO/HOME	OFF <input checked="" type="checkbox"/> ON	SUPPRESSED
Progressive	AUTO	OFF <input checked="" type="checkbox"/> ON	AUTO: \$152.45/MONTH
Travelers	AUTO/HOME	OFF <input checked="" type="checkbox"/> ON	AUTO: \$76.08/MONTH HOME: ERROR
Farmers	AUTO/HOME	OFF <input type="checkbox"/> ON	

CROSS-SELL OPPORTUNITIES

Pet 7 Questions Left 52% **CRUSH IT**

Term Life 9 Questions Left 57% **CRUSH IT**

CUSTOMER HISTORY Only Show Everything

8/2/2017 4:09P	DATA	CL	Parent Lead Source from MyLifeProtected to bbva
8/2/2017 4:09P	DATA	CL	Lead Source from Inbound to WebDirect
8/2/2017 4:09P	DATA	CL	Referral Code from mylifeprotected-inbound to bbva-mlp-web
8/2/2017 4:09P	NOTE	RC	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	EVENT	4K	Policy Bound
8/2/2017 2:52P	DATA	RC	Quote Type from Auto to Bundle
8/2/2017 2:52P	STATUS	RC	Bound.
8/2/2017 2:52P	AGENT	4K	Manager from Travis Tummond to Reggie Charles
8/2/2017 2:52P	EVENT	4K	Homesite Home Shell Created
8/2/2017 2:48P	NOTE	CL	Morbi commodo, ipsum sed pharetra gravida, orci magna...

LEAD INFORMATION
AUTO: DRIVER INFO
AUTO: CARS INFO
AUTO: INCIDENTS
AUTO: STATE QUESTIONS
AUTO: COVERAGES
HOMEOWNERS: PROPERTY INFO
HOMEOWNERS: UPDATES
HOMEOWNERS: EXTRAS
HOMEOWNERS: QUESTIONS
HOMEOWNERS: COVEAGE

RUN QUOTES

USER SELECTED AUTO AND HOME LIBERTY - AUTO AND HOME BUNDLES QUOTE FRESHNESS: JUST RUN

AUTO: \$1,254.65 HOME: \$954.54 TOTAL: \$2,209.19

AUTO QUOTE	
PAID IN FULL	MONTHLY
	NOTES
	QUOTED AUTO COVERAGES
	RPV: Y OEM: N UM: 250/500
	RREIM: 50/1500 COLL: 500 UNDUM: 250/500
	TL: EAP BI: 250/500 MEDPM: 5000
	COMP: 500 PD: 100000 UMPD: REJ

\$1,254.65
TERM: 12-MONTH POLICY

HOME QUOTE	
PAID IN FULL	NOTES
	QUOTED HOME COVERAGES
	Medical: 5000 Property: 100
	COMPREHENSIVE DEDUCTIBLE: 1000 Term: 12-month Policy
	Medical: 5000 Property: 100

\$954.54
TERM: 12-MONTH POLICY

GOTO LIBERTY TO BIND

PROGRESSIVE - AUTO ONLY QUOTE FRESHNESS: JUST RUN

PAID IN FULL	MONTHLY	NOTES	QUOTED AUTO COVERAGES
			RPV: Y OEM: N UM: 250/500
			RREIM: 50/1500 COLL: 500 UNDUM: 250/500
			TL: EAP BI: 250/500 MEDPM: 5000
			COMP: 500 PD: 100000 UMPD: REJ

\$436.25
TERM: 6-MONTH POLICY

GOTO PROGRESSIVE TO BIND

ERROR TRAVELERS - AUTO AND HOME BUNDLES QUOTE FRESHNESS: JUST RUN

AUTO: \$1,524.65 HOME: ERROR TOTAL ANNUAL PREMIUM: -
2 6-MONTH POLICIES

AUTO QUOTE	
PAID IN FULL	MONTHLY
	NOTES
	QUOTED AUTO COVERAGES
	RPV: Y OEM: N UM: 250/500
	RREIM: 50/1500 COLL: 500 UNDUM: 250/500
	TL: EAP BI: 250/500 MEDPM: 5000
	COMP: 500 PD: 100000 UMPD: REJ

\$773.65
TERM: 6-MONTH POLICY

HOME QUOTE

TRAVELERS HATES YOUR HOUSE

GOTO TRAVELERS TO BIND

SAFECO - SUPPRESSED

SAFECO WON'T QUOTE A DRIVER WITH LESS THAN 5 YEARS EXPERIENCE.

RUN IT ANYWAY

PROGRAM DEETS

Parent Lead Source: Web In-Bound

Referral Code: Northeastern University Alumni Association-Inbound

Lead Carrier: Liberty Mutual then Safeco

Notes:
This is the Liberty Affinity program, the Liberty quote should be presented first with every attempt make to close that policy. Next carrier would be Safeco, only then should we present the user with the other carrier options.

SCRIPT

"Thank you for calling the Northeastern University Alumni insurance benefits Program, a partnership with Liberty Mutual Insurance. My name is Travis, how may I help you with your insurance needs today?"

Liberty Affintiy Partner - Code: 9999

Address as Alumni

AVAILABLE CARRIERS

CARRIER	PRODUCTS	RTQ	QUOTES
Liberty	Auto/Home	OFF <input checked="" type="checkbox"/> ON	User Selected Auto and Home
Safeco	Auto/Home	OFF <input checked="" type="checkbox"/> ON	Safeco won't quote if the custom hasn't had their license for more than 5 years.
Progressive	Auto	OFF <input checked="" type="checkbox"/> ON	
Travelers	Auto/Home	OFF <input checked="" type="checkbox"/> ON	Unable to validate one of the vehicle VINs in this quote.
Metlife	Auto	OFF <input type="checkbox"/> ON	RTQ Not Available

LOCAL DEETS

East Walpole, MA 45° 12:35 pm

CROSS-SELL OPPORTUNITIES

Home 4 Questions Left 87% CRUSH IT

Pet 7 Questions Left 57% CRUSH IT

CUSTOMER HISTORY Only Show Everything

8/2/2017 4:09P	Data	CL	Parent Lead Source from MyLifeProtected to bbva
8/2/2017 4:09P	Data	CL	Lead Source from Inbound to WebDirect
8/2/2017 4:09P	Data	CL	Referral Code from mylifeprotected-inbound to bbva-mlp-web
8/2/2017 4:09P	Note	RC	Lorem ipsum dolor sit amet, consectetur adipiscing elit
8/2/2017 2:52P	Event	4K	Policy Bound
8/2/2017 2:52P	Data	RC	Quote Type from Auto to Bundle
8/2/2017 2:52P	Status	RC	Bound.
8/2/2017 2:52P	Agent	4K	Manager from Travis Tummond to Reggie Charles
8/2/2017 2:52P	Event	4K	Homesite Home Shell Created
8/2/2017 2:48P	Note	CL	Morbi commodo, ipsum sed pharetra gravida, orci magna...

CREATE REPORT

REPORT SETUP

REPORT TYPE
Policy Report

PRODUCT
Auto

DATE RANGE FIELD
record_creation_time

FIELDS

LEAD_UUID
POLICY_SHELL_UUID
PC_USER_ID
<input checked="" type="checkbox"/> POLICY_SHELL_ID
LOB
INSURANCE_TYPE
CARRIER_ID
CARRIER_NAME

AUTO RATING FACTORS

INSURED_DRIVING_EXPERIENCE
<input checked="" type="checkbox"/> INSURED_AGE
INSURED_GENDER
<input checked="" type="checkbox"/> MIN_DRIVER_AGE
<input checked="" type="checkbox"/> MAX_DRIVER_AGE
NUMBER_INEXPERIENCED_DRIVERS
MIN_DRIVER_YEARS_DRIVING_EXP
<input checked="" type="checkbox"/> NUMBER_DRIVERS_WITHOUT_VALID_LIC

CREATE YOUR REPORT VIA

SQL "WHERE" CLAUSE

CONDITIONS

CONDITIONS

COLUMN agent_id OPERATOR = CONDITION 242

COLUMN last_modified OPERATOR > CONDITION 2018-01-30

+ ADD ANOTHER CONDITION

SAVE THIS REPORT?

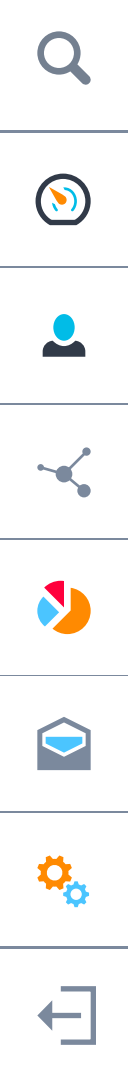
SAVE ME BRO

REPORT NAME
Total and Complete Sales DOMINATION

RUN AND SAVE REPORT

SAMPLE

POLICY_SHELL_ID	INSURED_AGE	MIN_DRIVER_AGE	MAX_DRIVER_AGE	NUMBER_DRIVERS_WITHOUT_VALID_LIC	NUMBER_MARRIED_DRIVERS
242	autop	Web Start - Not Yet Quoted	ama-mlp-wt	894	187
242	autop	New Lead - Crushing	ama-mlp-wt	856	898
242	autop	Sale In Process - Sent Bindable Quote	ama-mlp-wt	989	704
242	autop	Web Start - Not Yet Quoted	ama-mlp-wt	214	290
242	home	Web Start - Not Yet Quoted	ama-mlp-wt	853	79
242	home	Bound - Bound By Agent	ama-mlp-wt	65	640
242	autop	Bound - Bound By Agent	ama-mlp-wt	84	581
242	life	Bound - Bound By Agent	ama-mlp-wt	390	960
242	home	Sale In Process - Sent Bindable Quote	ama-mlp-wt	583	713
242	autop	Web Start - Not Yet Quoted	ama-mlp-wt	69	255



REPORT TYPE

- LEADS
- COMMUNICATIONS
- QUOTES
- QUOTE REQUESTS
- POLICIES
- POLICLY SHELLS

POLICY FIELDS



SELECT ALL

SELECT NONE

MEMBERSHIP_GROUP_ID
LAST_UPDATE_TIME
INSURANCE_TYPE
<input checked="" type="checkbox"/> PRODUCT_TYPE
ENTITY_ADDRESS_CITY
ENTITY_ADDRESS_COUNTRY

AUTO RATING FACTORS



SELECT ALL

SELECT NONE

MEMBERSHIP_GROUP_ID
LAST_UPDATE_TIME
INSURANCE_TYPE
<input checked="" type="checkbox"/> PRODUCT_TYPE
ENTITY_ADDRESS_CITY
ENTITY_ADDRESS_COUNTRY

HOME RATING FACTORS



SELECT ALL

SELECT NONE

MEMBERSHIP_GROUP_ID
LAST_UPDATE_TIME
INSURANCE_TYPE
<input checked="" type="checkbox"/> PRODUCT_TYPE
ENTITY_ADDRESS_CITY
ENTITY_ADDRESS_COUNTRY

CREATE YOUR REPORT VIA

- SQL "WHERE" CLAUSE
- CONDITIONS

WHERE CLAUSE

SAVE THIS REPORT?

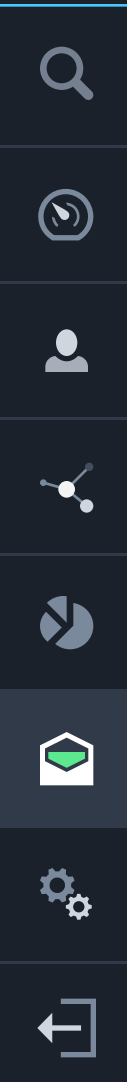
SAVE ME BRO

REPORT NAME
Total and Complete Sales DOMINATION Report

SAMPLE

AGENT_ID	PRODUCT_TYPE	POLICY_STATUS	REF_CODE	USER_ADDRESS_ZIP
242	autop	New Lead - Crushed	ama-nlp-wt	43016
242	home	Web Start - Not Yet Quoted	ama-nlp-wt	02145
242	home	Web Start - Not Yet Quoted	ama-nlp-wt	44424
242	autop	Bound - Bound By Agent	ama-nlp-wt	39054
242	home	Web Start - Not Yet Quoted	ama-nlp-wt	70575

RUN AND SAVE REPORT



LEAD IMPORT

UPLOAD A NEW LIST

FIND THAT FILE



UPLOAD LIST

PREVIOUS UPLOADS

DATE	FILE NAME	TOTAL LEADS	IMPORTED LEADS
08/16/2019	ServeEggsAnytime.xls	771	424
09/06/2019	WhyDoMakeAheadRecipes.xls	538	290
10/18/2019	GasOvens.xls	548	70
01/29/2019	HowToCookATurkey.xls	893	517
03/20/2019	TheImportanceOfFoodElements.xls	721	276
08/25/2019	AussieChefSharesCulinary.xls	943	65
04/10/2019	MessesMakeMemories.xls	563	459
04/07/2019	ServeEggsAnytime.xls	651	375
05/23/2019	BeatTheSummerHeat.xls	436	170

SELECT COLUMNS

USER ID	DATE	LAST NAME	FIRST NAME	STREET ADDRESS	UNIT	CITY	STATE
MAP ME TO... Ignore	MAP ME TO...	MAP ME TO...	MAP ME TO...	MAP ME TO...	MAP ME TO...	MAP ME TO...	MAP ME TO...
4504554186	08/16/2019	Douglas	Alex	357 Rita Prairie		Rubiefurt	NM
6160542405	09/06/2019	Herrera	Harvey	8057 Bayer Drive		Tristonton	MS
4520938980	10/18/2019	Love	Devin	6432 Blanda Views	Apt. 910	Lake Kelley	OR
5356817162	01/29/2019	Jimenez	Mario	850 Schuppe Spurs		Alyciaside	MI
1879771831	03/20/2019	Williamson	Jeffery	63 Wolf Heights		Karianneport	NY
8219912685	08/25/2019	Cohen	Juan	527 Fred Road		Rheaton	NY
3571061241	04/10/2019	Guerrero	Bill	033 Kautzer Isle		Stantonside	SD
9391960401	04/07/2019	George	Bruce	0831 Virginie Square	Apt. 046	South Jalynborough	VA
5540488644	05/23/2019	Shaw	Victor	8069 Erica Glen	Suite 983	Lake Jean	WI
4671177686	05/23/2019	Stanley	Fred	98 Dusty Harbor		Dawsonborough	CT

[CANCEL](#)



UPLOAD LEADS

SELECT COLUMNS

TE	UNIT	CITY	STATE	ZIP	PHONE	EMAIL
MAP ME TO... address_state	MAP ME TO... address_2	MAP ME TO... address_city	MAP ME TO... address_state	MAP ME TO... address_zip	MAP ME TO... phone	MAP ME TO... email
		Rubiefurt	NM	02982	276-962-3700	geovany_klocko@yahoo.com
		Tristonton	MS	73666	744-321-1795	clement_crooks@hotmail.com
	Apt. 910	Lake Kelley	OR	51859	790-354-2426	labadie_timmothy@abernathy.tv
		Alyciaside	MI	40187	584-052-1410	breana.beer@yahoo.com
		Karianneport	NY	30664	527-863-4527	alek_waelchi@hotmail.com
		Rheaton	NY	94572	435-163-7084	berenice.schuster@hotmail.com
		Stantonside	SD	87498	905-879-9847	quitzon.elissa@pearline.biz
	Apt. 046	South Jalynborough	VA	01986	038-283-2129	darrell.bernier@yahoo.com
	Suite 983	Lake Jean	WI	43642	037-641-7086	ernest.feest@hotmail.com
		Dawsonborough	CT	82283	158-853-0038	liliane.harvey@gmail.com

+ ADD A COLUMN

[CANCEL](#)



UPLOAD LEADS