In-Client Book (INB) Storyboard
Agents and brokers interaction with In-Client Book in request for car insurance from a new customer
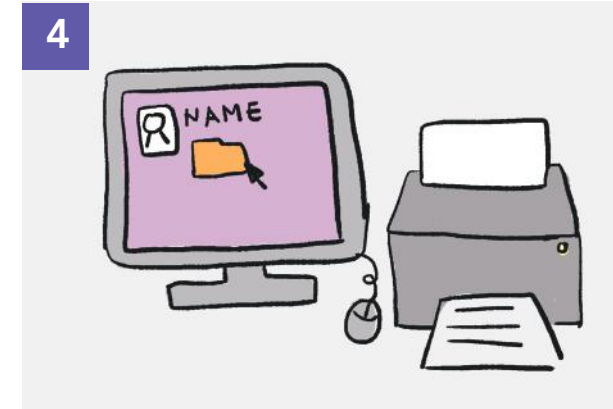

1

Agent has a new customer looking for car insurance. Agent contacts the agency and broker gives agent options to present to the customer.

2

Customer agrees on an option provided by the agency and agent contacts broker for a final detailed quotation. Agent also begins creating the customer's profile on **INB.**
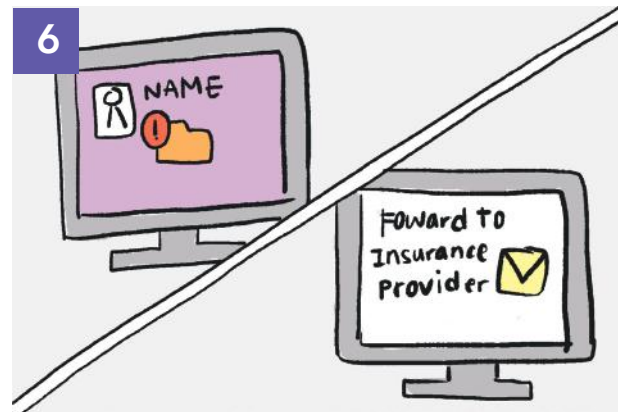
3

Broker presents agent with the final detailed quotation who then passes it on to the customer. The customer agrees and broker creates a new folder for the insurance on **INB** with a checklist of the documents he/she requires from the agent and customer.

4

Agent accesses **INB** to find the documents and prints it out for the customer. Customer fills out the documents and returns it to the agent.

5

Agent scans the documents and upload them on to **INB.**

6

Broker is notified that documents have been uploaded and reviews them. After reviewing, he forwards the documents to the Insurance provider.
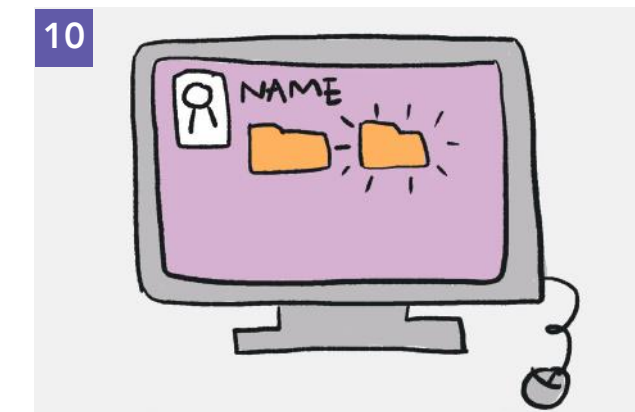
7

A year later, broker is notified by **INB** that the customer's insurance is expiring soon. Broker reviews the customer's profile as he prepares to contact the agent about renewal. He uses the customer profile to find opportunities where he may offer additional insurance advice or consultation.

8

Broker contacts the agent about the renewal and offers suggestions on new insurance that may be of the customer's interest. The agent forwards this message to the customer and refers back to **INB** on documents he needs to update.

9

Agent prints out the documents he needs to update and passes it to the customer to fill. Customer returns the completed document to the agent who uploads it on the insurance folder on **INB.**

10

Broker reviews the documents and forwards it to the insurance provider. Agent updates the client's information on **INB** based on the renewal documents.