

01 Policy Submission Checklist

Follow this sequence after every sale

What happens in the days and months after a sale determines whether a client stays on the books — and whether they send you referrals. Work this checklist every time.

✓ Immediately After Submitting Policy

SAME DAY

- ☐ Send Welcome Email to client
- ☐ Confirm client contact information is correct
- ☐ Set expectation for policy delivery timeline

Post your sale in the TrueWealth Slack (IMPACT) — this is for production purposes!

✉ Send Thank You Card

WITHIN 1-2 DAYS

- ☐ Mail a thank-you card
- ☐ Personalize the message (use client's name + short note)
- ☐ Mail it out promptly

Goal: Build a personal connection + increase client retention.

📊 Business Tracking

SAME DAY

- ☐ Add client to your Business Tracker / CRM
- ☐ Include:
 - ☐ Policy submission date
 - ☐ Coverage amount
 - ☐ Carrier
 - ☐ Follow-up dates
- ☐ Set reminder for 30-day follow-up

☎ 30-Day Follow-Up

30 DAYS

- ☐ Call client to confirm they received their policy packet
- ☐ Ask if they have any questions about coverage

If client DID NOT receive packet: Call carrier → Request resend of policy packet → Update client with status.

🔄 Ongoing Client Management

60-90 DAYS+

- ☐ Review your client list (placed business)
- ☐ Reach out to check in
- ☐ Ask about:
 - ☐ Life changes (new baby, job, home, etc.)
 - ☐ Additional coverage needs
- ☐ Offer policy review or upgrades

🎯 THE GOAL

- ☐ Build long-term relationships
- ☐ Increase policy persistency (keep clients on the books longer)
- ☐ Create referral opportunities