

Insurance Agency First Impression Checklist

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Use this checklist to find opportunities to improve first impressions of your insurance agency.

Before Entering Your Agency			
First Impression Criteria	Yes	No	Comments
Do people ever say your agency is hard to find?	<input type="checkbox"/>	<input type="checkbox"/>	
Is it always easy to find a parking space?	<input type="checkbox"/>	<input type="checkbox"/>	
Is it easy to find the agency entrance?	<input type="checkbox"/>	<input type="checkbox"/>	
Are all walkways clean, safe, and well lit?	<input type="checkbox"/>	<input type="checkbox"/>	
Is signage easy to read during the day and night?	<input type="checkbox"/>	<input type="checkbox"/>	
Are the front windows clean?	<input type="checkbox"/>	<input type="checkbox"/>	
Does everything on your storefront appear to be in full working condition?	<input type="checkbox"/>	<input type="checkbox"/>	
Would every person, regardless of age, sex, physical appearance or ability, feel comfortable walking into your agency?	<input type="checkbox"/>	<input type="checkbox"/>	
Is it clear to passers-by who you are and what you sell?	<input type="checkbox"/>	<input type="checkbox"/>	
Stand 10 feet in front of your agency entrance. What overall impression do you get?			
What can you change to your agency's outward appearance to set the stage for an incredible customer experience?			

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Walking in the Door			
First Impression Criteria	Yes	No	Comments
Does interior lighting feel comfortable?	<input type="checkbox"/>	<input type="checkbox"/>	
Does anything seem out of place?	<input type="checkbox"/>	<input type="checkbox"/>	
Does it feel like an incredibly successful insurance agency?	<input type="checkbox"/>	<input type="checkbox"/>	
Is the office neat and well-organized?	<input type="checkbox"/>	<input type="checkbox"/>	
Are all visible desks clear of loose papers?	<input type="checkbox"/>	<input type="checkbox"/>	
Is furniture clean and well-kept?	<input type="checkbox"/>	<input type="checkbox"/>	
If you had to wait for an appointment, would it be enjoyable?	<input type="checkbox"/>	<input type="checkbox"/>	
Is all agency signage clean and professional?	<input type="checkbox"/>	<input type="checkbox"/>	
How does it feel to walk in the door?			
What are the first 5 things you SEE?			
What are the first 3 things you HEAR?			
Do you smell anything? What?			
What can you change so that first-time visitors to your agency are prepared for a pleasant and enjoyable experience?			

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Interaction With Office Staff			
First impression Criteria	Yes	No	Comments
Does someone greet all visitors with a smile and welcome them to the agency within 5 seconds?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the first employee visitors interact with fully and accurately represent your agency image?	<input type="checkbox"/>	<input type="checkbox"/>	
Are visitors offered anything to eat or drink?	<input type="checkbox"/>	<input type="checkbox"/>	
Are most repeat visitors welcomed by name?	<input type="checkbox"/>	<input type="checkbox"/>	
Are all staff members dressed and groomed professionally every day of the week?	<input type="checkbox"/>	<input type="checkbox"/>	
Are in-person clients given priority over incoming phone calls?	<input type="checkbox"/>	<input type="checkbox"/>	
<p>What can your staff do differently so agency visitors feel they have never been more welcome anywhere in their life?</p>			