

# Virtual Terminal module for First Impressions

Remote Quick Quoting (anywhere)

A 24 X 7 automated quote response system



## Description

“First Impressions” is just that. The first impression a prospect has of your responsiveness to their potential business. First Impressions is a 24 X 7 automated quoting system that shows your prospect you are responsive to their request for a quotation no matter what time of day that request is generated. The requested quote is sent out automatically within minutes of its receipt and with e-mail notification being sent to the Agent and up to 10 other staff people with the contact information, quote numbers and control number for follow-up.

First Impressions has a remote Quick Quoting tool called "Virtual Terminal." Virtual Terminal is a URL that is:

1. Portable
2. Does **not** need the Agents Alliance User Name/Password

## The Process

That URL presents a form that when filled will and

the "Submit" button is depressed the following will happen:

- Quote is e-mailed to the Requestor.
- Quote is e-mailed to the Agent.
- Quote is e-mailed to up to 10 (ten) Agency people (aka courtesy quote),
- Quote is saved in Alliance for Re-Quoting and
- Information (including control number) is **automatically** passed to Blitz Lead Manager if granted.

## The Agency Process

The Licensed Sales Producer receives the courtesy quote, looks up the prospect name or control number in Alliance, calls the prospect and moves the quote further down the Sales Pipeline.

## Efficiency

Quick quotes are easier than doing a quote in Alliance. Quote is received by prospect/requestor in 2-4 minutes.

**ROBO-agent**  
Automation of prospecting  
for New Business



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## 24 X 7 quoting

First Impressions/Virtual Terminal will run 7 X 24 unless Alliance goes down. First Impressions has RoboAgent and Re-Quotes "Self-Attending" mode where First Impressions will log the Agent back into Alliance and process that quote very shortly after Alliance is brought back up. In addition, a text message will be generated to the Agent notifying that person of the interruption. Quotes will be stored on our servers for the Agent until Alliance comes back. At that time those quotes will be sent to the First Impressions PC in your Agency for processing.

## What is your time worth? and Set-it-and-forget-it

First Impressions is a virtual employee that works 24 X 7 for a monthly salary.

## Agent usage of the Virtual Module, lead sources

- Telemarketer input
  - USA
  - Overseas
- Ethnic Events
- Sporting Events
- Shows (i.e. Motorcycle)
- Auto Dealerships
- Realtor referral input
- LSP overflow input by non-licensed staff
- Let your creativity wander

## LOBs Quoted (line of business)

1. Auto
2. Homeowners
3. Condo
4. Renters
5. Life (Term Life)
6. Motorcycle

**ROBO-AGENT QUICK QUOTE**

**Process an Auto Quote**

Advanced Quote

First Name:  \*Required      Last Name:  \*Required

Address:  \*Required      City:  \*Required

State:       Zip Code:  \*Required

Home Phone:       Cell Phone:

Work Phone:       Email Address:

**Prior Insurance and Credit Information**

Current Insurance Carrier:       Years Insured:

Policy Expiration Date:  /  /       Credit Rating:

Bankruptcy:       Own a Home:

Years at Current Address:

**Vehicle Information**

Number of Vehicles:

**Vehicle 1**

Year:  \*Required      Make:  \*Required

Model:  \*Required

**Driver Information**

Number of Drivers:

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