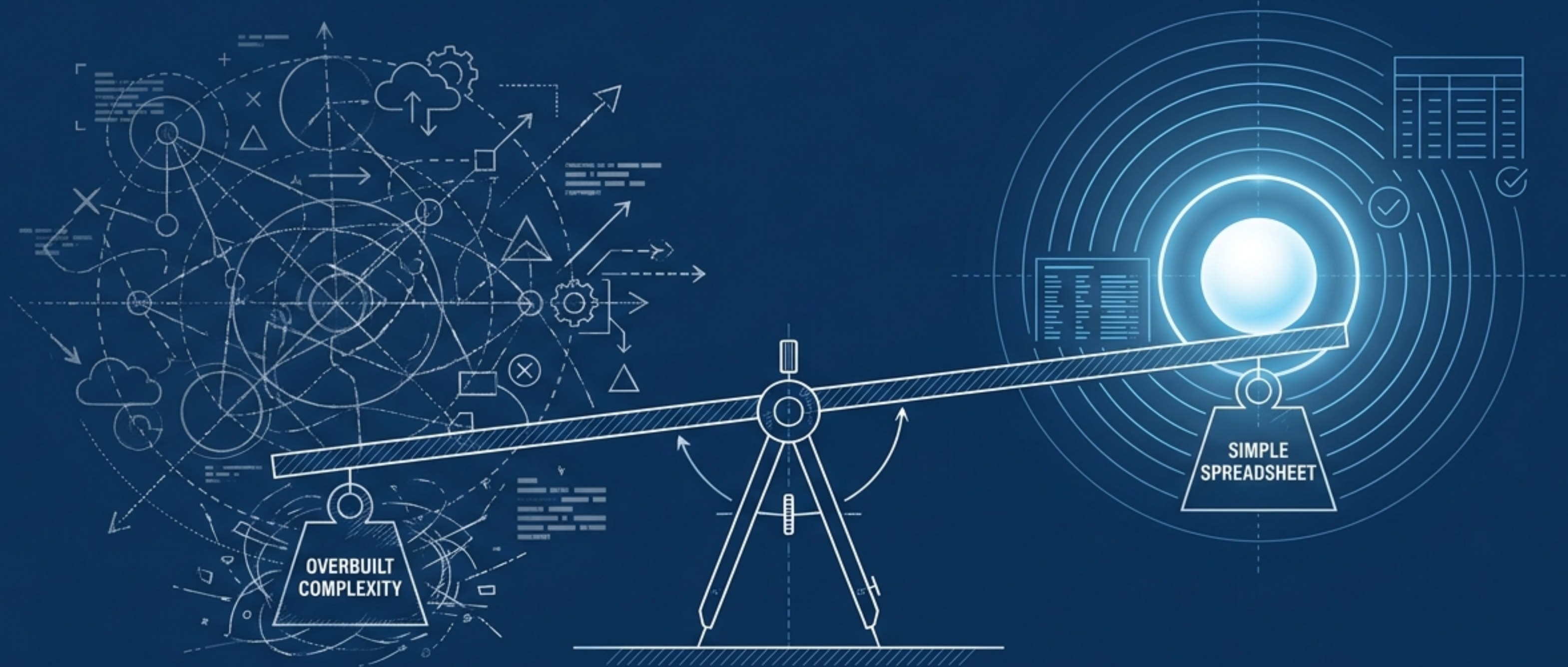


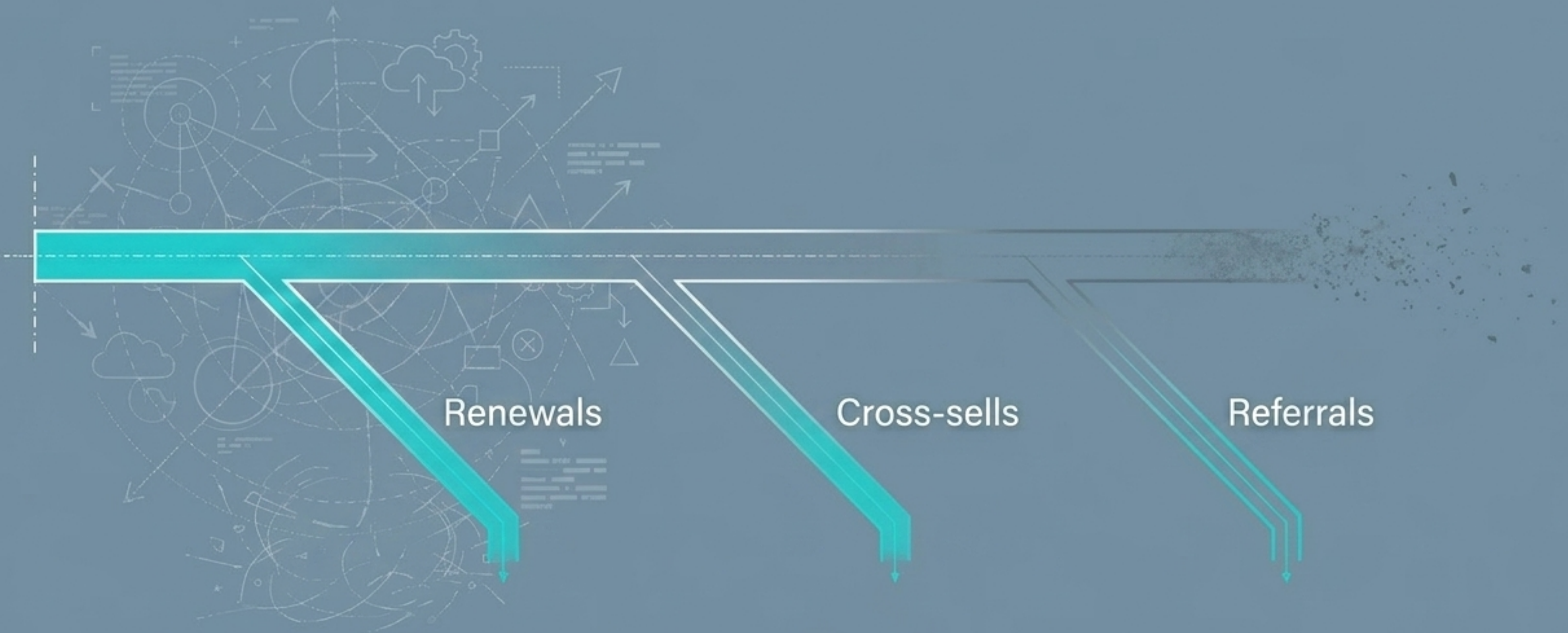
# How to Set Up a CRM for Insurance Agents

# Most agents have a complexity problem, not a CRM problem.



The fanciest CRM in the world is worthless if you don't open it.  
The simplest spreadsheet is gold if you do.

# Without a system, your book is bleeding out.



The fortune is in the follow-up. If you convince yourself you'll remember without a system, you will lose the business.

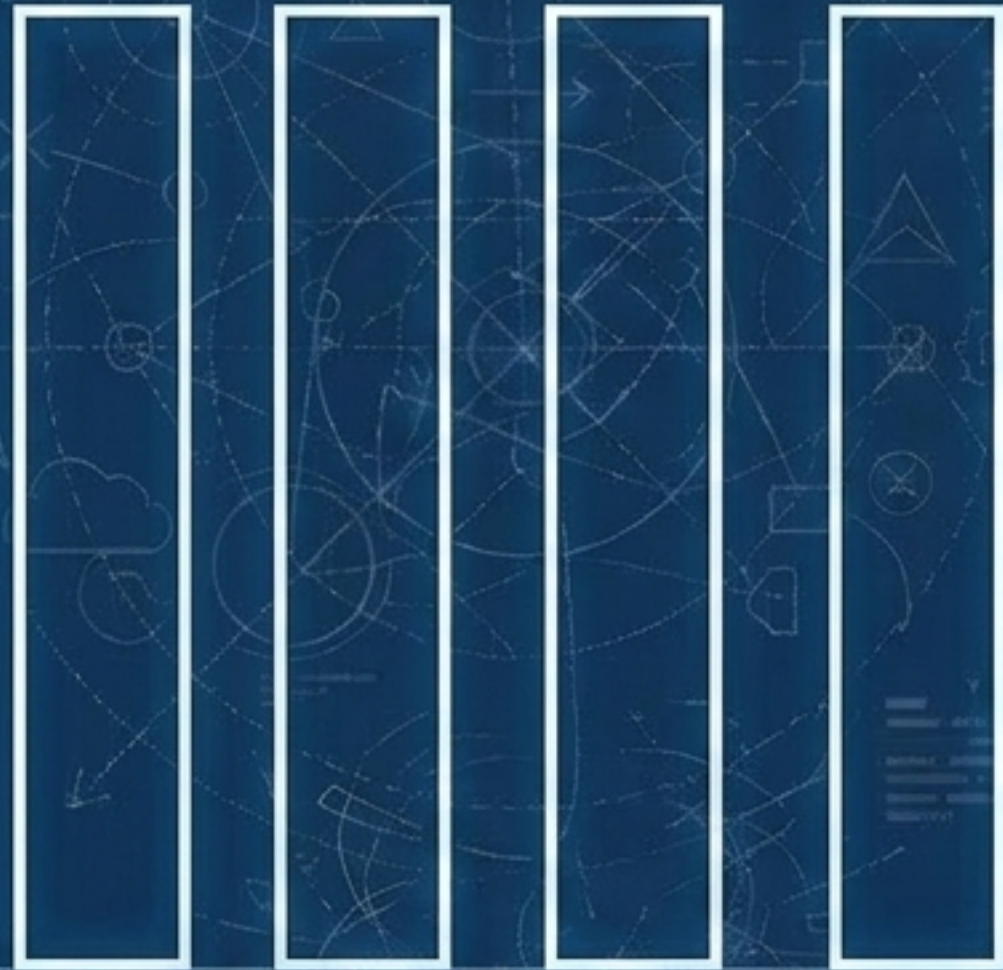
# Your single most valuable business asset.

**Active Client = Renewal + Cross-sell + Referral**

**Dormant Lead = Future Sale**

If you can't see who is in there and what they need, you can't grow.

# The four-field foundation.



90 Days

Resist the urge to add a 5th field until you have used the first four for 90 days.

Adding fields before you have the habit causes abandonment.

# Field 1: Contact Info



The Client

The Household

Full name, phone, email, address, and date of birth.

*Write down who lives in the house. The spouse and adult children are your most natural cross-sell and referral path.*

## Field 2: Last Interaction

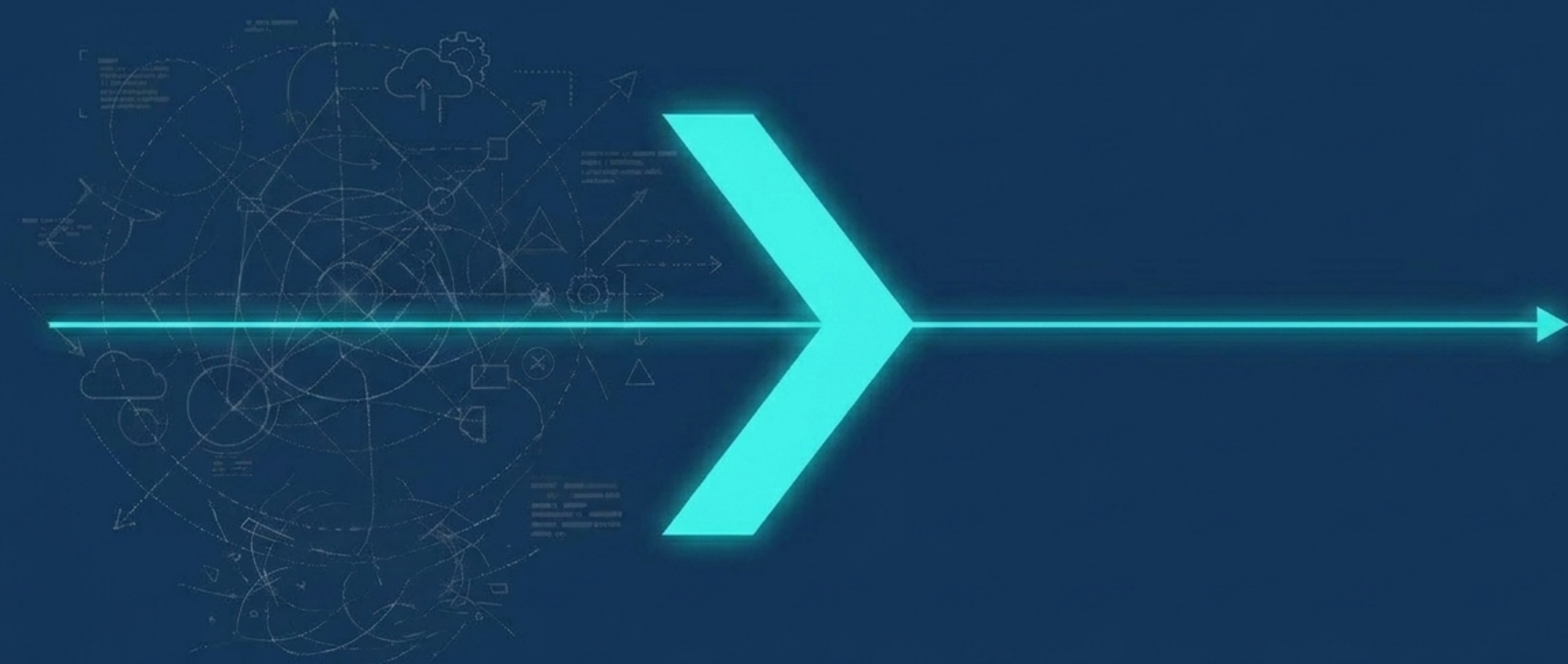
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*Not a transcript*

The date of the last meaningful touch and a brief summary.

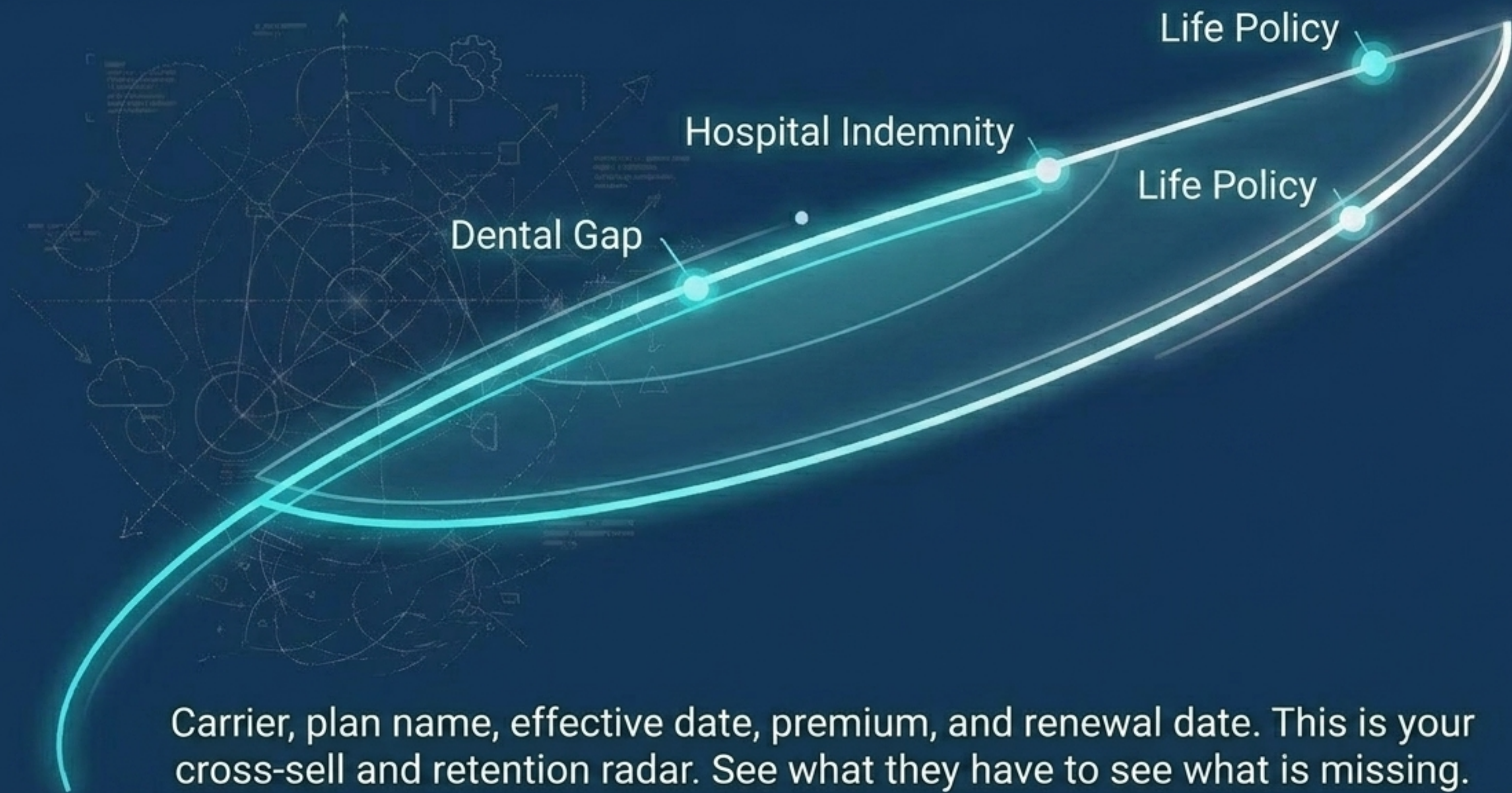
The date of the last meaningful touch and a brief summary. Enough context that when you call back, you sound like you remember the relationship.

## Field 3: Next Step



The single most important field in your CRM. What is the next action, and what is the date you will take it? Every active record needs one to prevent falling through the cracks.

# Field 4: Policy Info



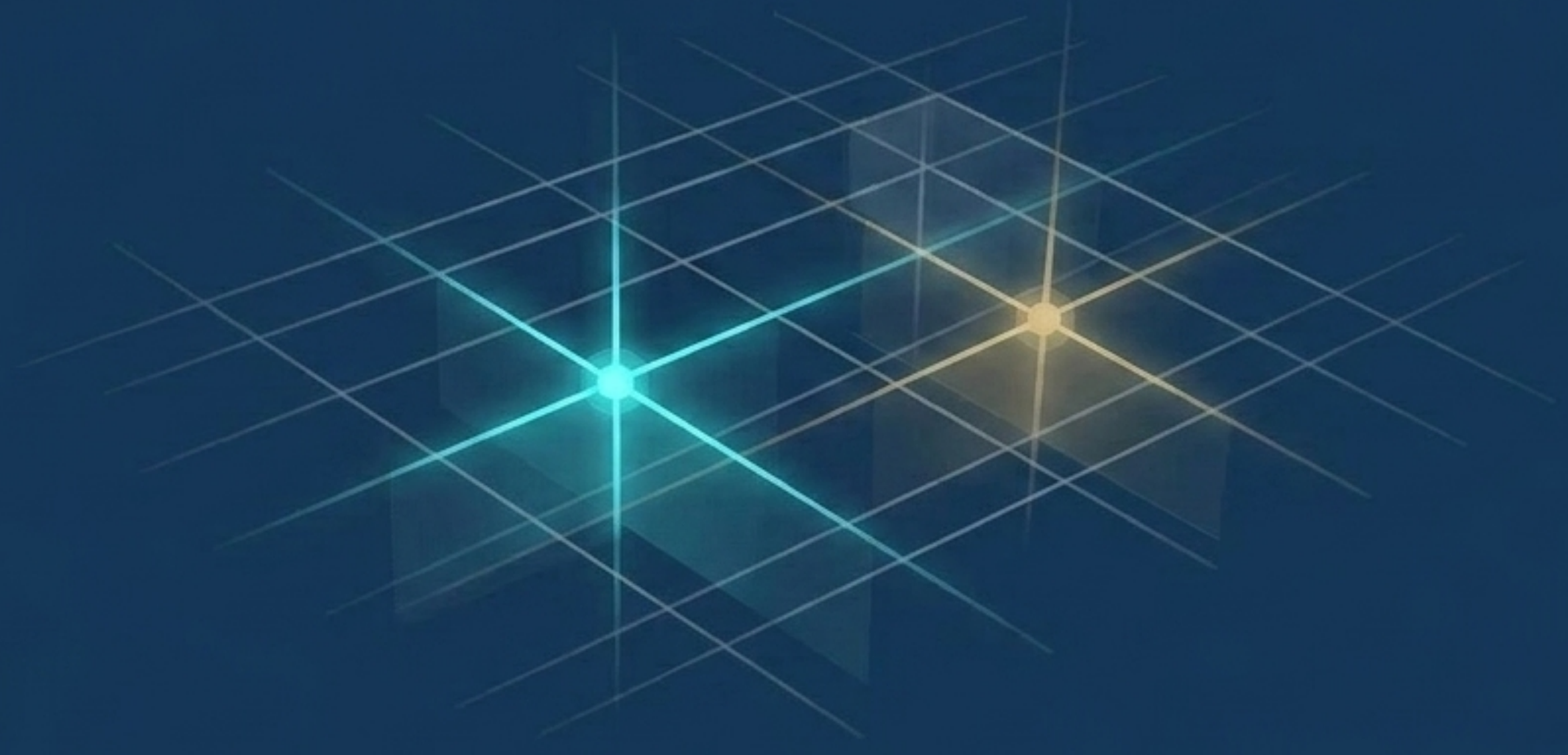
Build the habit around speed.

**60 Sec**

Appointment → Open Record → Update (Date, Summary, Next Step)

If logging takes longer than sixty seconds, you will stop doing it. Same-day entry is non-negotiable before you move to the next task. Filled-in beats fancy every time.

# The Review Cadence



A CRM without a regular review is just a digital filing cabinet.  
Block the time and treat it like a client appointment with yourself.

# Two recurring reviews.

**15 Min**

First thing in the morning.

Sort by next step date.

This is your immediate  
call list.

**30 Min**

Same day every week.

Assign missing next steps.

Flag policies with 60-day  
renewals.

# The Setup: Mrs. Alvarez

Contact: DOB Nov,  
Husband Carlos

Last: March 12,  
dental gap noted.

Policy: Advantage  
Plan, March Anniv.

**Next Step:**  
Call April 1.

# One client. Three transactions.

March



Setup

April



Call

(Updates Carlos  
turns 65 in Oct)

August



Cross-sell trigger  
(Carlos enrolled)

February



Annual Review  
(Dental gap filled)

How sixty seconds of data entry  
generates automatic future sales.

# **Build your foundation today.**

- 1. Create your 4 columns.**
- 2. Enter only your top 50 active clients.**
- 3. Run your first 15-minute review tomorrow morning.**

**A clean CRM doesn't make you a better agent.  
Using one every day does. Start today.**