

# THE 4Rs

*Remember: Always give the good news first. "I will take care of you." Be proactive, find solutions.*

## REVIEW

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## REMIND

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## RECOMMEND

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## RETAIN

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"DISCIPLINE TAKES NO VACATION"

# SYSTEMATIC NOTE TAKING

- Use “Household Alert” to make visible at top of household page
- Uncheck “Alert” and replace each time FORM is updated
- Change dropdown from “Clip Text” to “Wrap Text” for easier viewing

## FORM Information

F:

O:

R:

M:

Date Updated:

## New Customer Information Example

New Customer [Date we wrote them]

A:

with Geico paying 113/month, 30/60/25, 500 comp and coll, with H; increased to 50/100/50 0 comp 1k coll, left H and added R; doubled liab to cover assets, didn't like state mins, we are 100/month.

F:

no prior fire cov, added renters at 25k prop 300k liaband water/sewer backup with PAP on laptop for 14.58/month

L:

offered 275k 20 year term, declined, said he had life through work 3x salary and no real debt

H:

wrote STDI 1000/month benefit 30-day elim 1 year for 12/month

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# REFERRALS AND REVIEWS

## Referrals

- ASK
- “We need your help”
- Use FORM
- Follow up

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## Reviews

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## ADDITIONAL NOTES

[illegible]

**“DISCIPLINE TAKES NO VACATION”**