

# Agency Service Diagnosis Reporting Checklist

## Identify Where Service is Limiting Agency Growth

Before implementing automation or a client service platform, agencies should evaluate the true volume, type, and cost of service work.

Run the following reports from your Agency Management System (AMS), phone system, and email platform.

### 1. CSR ACTIVITY & WORKLOAD REPORTS

**Goal:** Understand how much time CSRs spend on service vs revenue-generating activities.

#### REPORTS TO RUN

- ✓ Activities by CSR (last 90–180 days)
- ✓ Activities by Activity Type
- ✓ Average activities per policy
- ✓ Activities per client
- ✓ Activities per CSR per day

#### Key Questions

- How many service requests per CSR per day?
- Which CSRs are overwhelmed?
- Which activities dominate their workload?

#### Red Flags

- CSRs consistently completing 70–100+ activities per day.
- Producers relying on CSRs for quoting tasks
- Producers handling low-value service tasks
- High activity volume on small accounts

**ATTENTION**

### 2. ACTIVITY TYPE BREAKDOWN

**Goal:** Identify the most common service requests.

#### REPORTS TO RUN

- ✓ Activity Type Frequency
- ✓ Endorsements by Type
- ✓ Certificates of Insurance issued
- ✓ Policy document requests
- ✓ ID card requests
- ✓ Billing questions

#### Key Questions

- What are the top 10 service requests?
- Which requests could be self-service?

### COMMON AGENCY FINDINGS

Top 5 service requests are usually:

1. COIs
2. ID Cards
3. Policy documents
4. Mortgagee changes
5. Billing questions
6. Evidence of Insurance

These often represent 50–70% of CSR workload.

### 3. ENDORSEMENT VOLUME REPORTS

**Goal:** *Understand how many policy changes are processed.*

#### REPORTS TO RUN

- ✓ Endorsements by policy type
- ✓ Endorsements by CSR
- ✓ Endorsements per client
- ✓ Endorsements per policy

#### Key Questions

- Which clients require the most endorsements?
- Which policy types generate the most service work?

#### Red Flags

- Small commercial accounts generating excessive endorsements
- Frequent COI-related policy edits

### 4. CERTIFICATES OF INSURANCE REPORTING

**Goal:** *Measure one of the largest service drains in agencies.*

#### REPORTS TO RUN

- ✓ COIs issued per month
- ✓ COIs issued per CSR
- ✓ COIs by client
- ✓ COIs by policy type

#### Key Questions

- How many COIs are issued monthly?
- Which clients generate hundreds of certificates?

#### BENCHMARK

Even smaller Construction accounts can generate 50-300 COIs per year.

### 5. EMAIL VOLUME REPORTS

**Goal:** *Measure inbound service demand.*

#### REPORTS TO RUN

- ✓ Email volume by CSR inbox
- ✓ Emails received per day
- ✓ Email threads per client

#### Key Questions

- How many emails does the service team receive daily?
- Which clients generate the most communication?
- What percentage of email communication is never documented in the AMS?

#### Red Flags

CSRs receiving 150+ emails per day

### 6. PHONE SYSTEM REPORTS

**Goal:** *Identify the true demand for service.*

#### REPORTS TO RUN

- ✓ Incoming calls per day
- ✓ Missed calls
- ✓ Calls by department
- ✓ Average call duration

#### Key Questions

- How many service calls occur daily?
- How many calls are missed/go to voicemail.

#### BENCHMARK

A typical \$5M agency receives 80-120 calls per day.

## 7. QUOTING ACTIVITY REPORTS

Goal: Identify lost sales capacity.

### REPORTS TO RUN

- ✓ Quotes created per producer
- ✓ Quotes completed per CSR
- ✓ Quotes delivered per week

### Key Questions

- How many quoting opportunities are actually processed?



**Red Flag**

- Producers quoting less than 5-10 opportunities per week

## THE KEY DIAGNOSTIC QUESTIONS

After running these reports, agencies should answer:

1. What are the top 10 service requests?
2. What percentage of service work could be self-service?
3. Which clients generate excessive service demand?
4. How many service interactions occur per day?
5. How much CSR & Producer capacity is consumed by routine tasks?

TOP SERVICE REQUEST	IA APP SOLUTION
1.	YES NO
2.	YES NO
3.	YES NO
4.	YES NO
5.	YES NO
6.	YES NO
7.	YES NO
8.	YES NO
9.	YES NO
10.	YES NO

## WHAT MOST AGENCIES DISCOVER

When agencies run these reports, they typically find:

**50-70% of Service Work is Repetitive**

**Top 5 Requests Dominate Service Demand**

**CSRs Spend Most of Their Time on Low-value Tasks**

**Producers Lose Quoting Capacity Because Service Consumes Staff Bandwidth**