

The Combined Group Core Agent Profile

Agency Name _____ City/St: _____

TCG Assigned Agent Number # _____ Survey Completed by: _____

Date _____ Agency Visit Phone Interview:

Person Interviewed _____ Owner Pres Office Manager

Other: (Give Title and reason) _____

1. What is the written premium volume for your agency over the past 12 months? \$ _____

- % Commercial _____ % Personal _____
- What percentage of commercial premium is written through surplus lines markets? _____%
- What percentage of commercial premium is written on a monoline (unsupported) basis? _____%

2. Which property/casualty carriers (top 5) have direct contracts with your agency?

Carrier Name	2007 Written Premium

3. Which MGAs/Wholesalers (top 5) do you submit business to?

MGA Name	2007 Written Premium

4. Do you use MGAs primarily for?

- Commercial E&S
- Standard Commercial
- Middle Market (Commercial)
- Personal Lines
- Other _____

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5. How many people in your office are responsible for the placement of commercial lines business? _____

6. Does your staff utilize Internet rating systems? _____

- If yes, which systems do you use? _____

- What lines of business do you normally rate online?

- | | |
|--|---|
| <input type="checkbox"/> BOP | <input type="checkbox"/> Non-Subscription/Occupational Accident |
| <input type="checkbox"/> General Liability | <input type="checkbox"/> Inland Marine |
| <input type="checkbox"/> Commercial Property | <input type="checkbox"/> Personal Lines |
| <input type="checkbox"/> Commercial Auto | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Work Comp | <input type="checkbox"/> Other _____ |

- In an average month, how many quotes do you produce through online rating systems?

- | | |
|----------------------------------|---------------------------------------|
| <input type="checkbox"/> 1 – 10 | <input type="checkbox"/> 26 - 50 |
| <input type="checkbox"/> 11 – 25 | <input type="checkbox"/> More than 50 |

- Please rank the top 5 industry groups (Construction, Habitational, Restaurant, Retail, etc) quoted by your agency?

1. _____
2. _____
3. _____
4. _____
5. _____

- What do you consider to be the 3 most important features of an online rating program?

1. _____
2. _____
3. _____

7. Please provide 2 names in your agency that we may contact to discuss our Internet rating programs.

Name

Phone Number

Email Address

8. What agency management (i.e. AMS) system do you currently use? _____

9. Do your Employee's Computers have Speakers? Yes No

10. Do you write occupational injury coverages for Texas non-subscribers? _____

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- If yes, whose program(s) do you use? _____

11. Does your agency write "Middle Market" business (total account premiums in excess of \$30,000)? _____

- If yes, what percentage of this business is written through E&S markets? _____%
- How many middle market accounts do you normally write in an average year?

1 – 5

11-15

6 – 10

More than 15

- Please rank the top 5 Middle Market industry groups (Construction, Habitational, Manufacturing, Retail, Wholesale, etc) quoted by your agency?

1. _____
2. _____
3. _____
4. _____
5. _____

12. Please rank the following in order of importance when selecting a partner MGA:

____ Internet Rating Programs

____ Quote pricing

____ Quote turnaround time

____ Competent customer service

____ Commission

____ Variety of products and services

____ Other _____

13. How can we help you write more business in the next 12 months?

