

# Quote & Apply Management Information

# LifeQuote

With a Quote & Apply site we will handle all elements of the underwriting process from GP and insurer liaison to, obtaining further information from your clients, and confirmation of the acceptance terms. This means you won't need to be involved and can track progress through LifeQuote's Case Tracking tool. We will provide regular MI and data to help you keep track and analyse the quote and apply process.

## **Automated MI**

You will receive a daily file directly to your email which will provide you with a month to date run down of your traffic. Your MI summary will include data on clients, quotes, applications and commission.

## **Google Analytics**

Analytics is a powerful application for tracking traffic patterns on your website. The fact that it's an entirely free program, and integrates with other Google programs, like AdSense and AdWords, only makes it that much more valuable. If you already have a Google Analytics account we can apply it to your website.

## **Lead Data**

For a variety of reasons we know that not all clients complete their application online. At LifeQuote we don't want you to lose these perspective sales. This is why we have created a data feed to provide you with all the information you would need to be able to follow up with your client.

## **Case Tracking**

In order to keep track of applications, we provide you with a Case Tracking tool. Not only does this give you access to every application regardless of insurer, Case Tracking with LifeQuote requires only one password. This eliminates the need to keep track of multiple sets of logins to track your clients progress once they have completed their application.

## **Special Requirements**

We want to provide you with all the tools to make the most out of your Quote & Apply site. We have developed an API that allows real time case tracking without the need for logging in to the system. For more information on this or if you have any other specific MI needs that we haven't covered, please contact us to discuss.

For more information or to get started with a Quote & Apply site please contact our Business Development team on 01243 791199.