

Group Health Insurance Lead Sheet (Example)

Date **06/13/2016 11:54** TSR Name **Cheri E.** TSR ID **Cheri**

Spoke to: **David** **Schmidt** Position: **Vice President**

Business Name: **Engineering Services** Address: **300 Potomac Street**

City: **Colorado Springs** State: **CO** Zip Code: **80012** Phone Number: **13031371361**

Have Coverage? **YES**

Renewal Date **August**

Employees Covered Under Plan **29**

Confirm Decision Maker **YES**

Best Time To Call **Please call
anytime Monday
through Friday**

Other Interests **David is interested
in chatting with
you about
business
insurance
coverage as well.**

Prospects Sex **MALE**

Total Employees - C **30+**

Vision or Dental? - C **Company offers
AFLAC**

Insurance Company **United Health**

Deductible **Deductible varies
by plan**

Premium **The Bookkeeper
would know**

Co-Pays **\$0-\$75**

Special Notes: **David is interested in speaking about how you can help regarding the company's Group Health Insurance. He mentioned his current agent hasn't been getting back to his emails. Conversation was professional yet pleasant.**