

Checklist and List of Resources for Writing Commercial Lines Business

- **Research your prospect before submitting the risk:**
 - Research Business Type
 - What are the risks associated with this business?
 - Review Prospect Website
 - What useful information can you find?
 - Are there any unexpected risks identified?
 - Verify current address via County Assessor Website
 - Determine if the prospect owns or rents the building
 - If they rent, who is the landlord to contact?
 - Check Social Media Accounts
 - Facebook Search
 - LinkedIn Search
 - Yelp Reviews Search
 - Use Google and Bing to search business
 - Check Google/ Bing Reviews
 - Look what other websites show up with additional information about the prospect.
 - Use [Google Earth](#)
 - What do you see?
 - What is the condition of the building?
 - Any unique characteristics about the building?
 - What is the roof type?
 - Check Real Estate Websites
 - [Zillow](#)
 - [LoopNet](#)
 - [Check the Secretary of State](#)
 - Is the business in good standing?
 - How long have they been in business?
 - In some states, the secretary of state has the owners name and email address.
 - Regional Building Department and County Property Tax Sites
 - Check for permits on building / updates
 - [Travelers Open House](#)
- **As an information gathering and a conversation tool use a questionnaire (not the ACORD form)**