Review before a follow-up

Participant worksheet

All records are invented. Source times are 16 October 2026, agency local time. Use only the supplied evidence below. A blank field stays unknown; a draft is not approval or proof that anything was sent. Try page 1 before looking at the separate authored key on page 2.

Q-501

08:00 review list: chase due. 09:10 supplied reply in a different thread: client has answered.

Q-502

08:15 supplied quote export. Owner: blank. Current contact record: blank. Contact verification time: unknown.

Q-503

09:25 supplied email asks whether a lower price keeps the same coverage.

Your review

For each case, record the source evidence, proposed disposition, responsible reviewer and facts still needed. Do not write a client reply or infer missing permission.

Case / source evidence	Disposition / next action	Reviewer / unresolved facts
Q-501		
Q-502		
Q-503		

Authored review key

Compare after completing page 1. These are the existing web exercise dispositions for these three fictional cases, not a model run, accuracy score or universal agency procedure.

Q-501

Stop the stale chase. Match the newer reply to the quote and update the review list before any draft. Newer evidence overrides the schedule.

Responsible reviewer: Assigned account owner checks both threads.

Q-502

Hold. Do not draft or send a chase until staff identify the owner and verify the current contact record.

Responsible reviewer: Service lead assigns an owner and resolves the missing contact.

Q-503

Refer to licensed staff. No AI answer, price or coverage promise. Keep the follow-up on hold for their review.

Responsible reviewer: Licensed producer reviews the question and source documents.

Before a person sends anything

Check the customer, quote, latest replies across threads, record times, owner and current contact details. Missing or conflicting evidence stays on hold. Staff decide the next action and record their review separately from any draft or actual send evidence. Questions about price or coverage stay with licensed staff.

What this does not establish

No ongoing monitoring, live AMS connection, sending control, software compatibility, compliance, customer result or production performance is demonstrated. Validate permitted access and the agency review process before live work. Do not put client records into an unapproved AI tool.

Source and publisher

Same three cases and web alternative: insuranceagencyvirtualassistant.com/inbox-and-follow-ups. Fictional source times remain 16 October 2026; this printable companion was prepared 20 October 2026.

Published by Cirlet. Tyler Mayberry offers separately scoped paid AI and automation help to insurance agencies. Talk to Tyler or email tyler@cirlet.com.