Agent

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| Definition | Someone who is licensed. Provides customers with quotes, and starts policies for customers |
| Type of agents | You might want to include a brief summary of certifications and professional skills. (Sales/Sales Supervisors) |
| how does a person become an agent | Pass state exam and earn a license. Hired. Proper security. |
| How does a person stop being an agent | Quit or be fired. |
| can this person occupy more than 1 role | Yes, they can be customers. |
| What do you need to know about the person filling this role | Current license in database as well as name, address, and social security. |
| Why is this role called what it is | Agent is the term for a licensed insurance agent. |

customer

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| Definition | People that are interested in purchasing an insurance policy. Or have an existing account. |
| Type of customers | Potential customer.  New customer.  Existing customers. |
| how does a person become an customer | Call or visit website. Purchase a policy. |
| How does a person stop being an customer | It’s a permanent role. |
| can this person occupy more than 1 role | Yes, they can be agents. |
| What do you need to know about the person filling this role | Name, address, and social security, driving history, car information, what coverages they want. |
| Why is this role called what it is | Customer is the standard industry term. |

Potential customer

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| Definition | People that are interested in purchasing an insurance policy. |
| Type of potential customers |  |
| how does a person become an potential customer | Call or visit website. |
| How does a person stop being an potential customer | Decide not to set up an account. |
| can this person occupy more than 1 role | They can be an agent. |
| What do you need to know about the person filling this role | Why they are visiting the website or calling. |
| Why is this role called what it is | Potential means that this person is looking to become a customer in the future. |

New customer

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| Definition | Customer with an existing account, but no policies. |
| Type of New customers |  |
| how does a person become an new customer | Set up an account. |
| How does a person stop being an customer | It’s a permanent role. |
| can this person occupy more than 1 role | Yes, they can be agents. |
| What do you need to know about the person filling this role | Name, address, and social security, driving history, car information, what coverages they want. |
| Why is this role called what it is | New is the term used to describe someone at the start of a process. |

exisiting customer

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| Definition | Customer with an existing account and policy. |
| Type of customers |  |
| how does a person become an customer | Call or visit website. Purchase a policy. |
| How does a person stop being an customer | It’s a permanent role. |
| can this person occupy more than 1 role | Yes, they can be agents. |
| What do you need to know about the person filling this role | Name, address, and social security, driving history, car information, what coverages they want. |
| Why is this role called what it is | Existing is used to describe someone who is a part of the system, and not new. |