

Your Case, Start to Finish

New Business Agent Guide

Book the case, answer our emails, and tap a button when your client decides. We handle the rest and email you at every step.

"Fast answers mean faster offers."

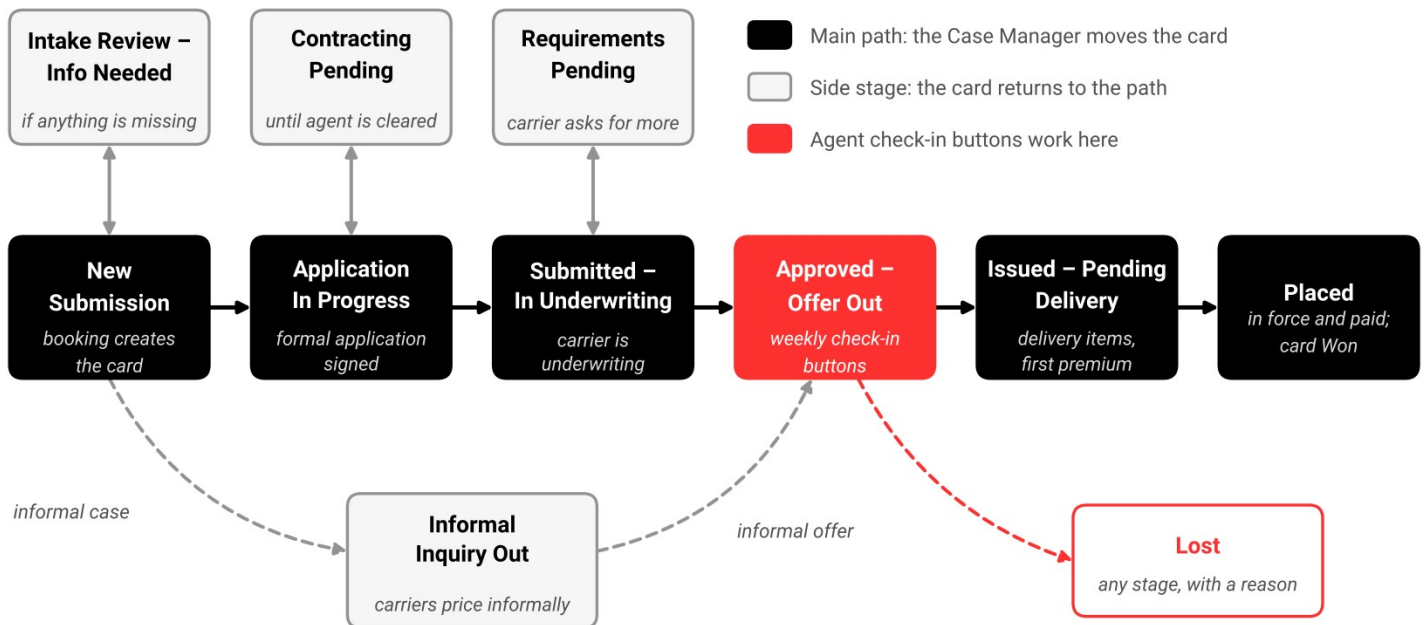
— Zoop Benefits New Business

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01 The case path at a glance

Your case moves down the middle path. A side stage is a short detour, and the case rejoins the path once that item is done. Informal cases go to the carriers first and join the path at Approved.



Tap Moving to formal on an informal offer and the case moves to Application In Progress.

02 Start to finish: your ten steps

Book the case, answer our emails, and tap a button when your client decides. We handle the rest and email you at every step.

- 1. Book the case.** Open the Start Underwriting page, fill in the form and pick a time for the case management call. One insured per booking.
- 2. Use a unique email and mobile for every adult.** A spouse needs their own. A minor child uses the parent's email and mobile, with the child's name in Insured Full Name.
- 3. Check your email and texts.** "Case started" arrives right away, by email and text. Make sure your client got the calendar invite and that it isn't in spam.
- 4. Let the call happen.** We walk through the case with your client. You don't need to join; we'll update you afterward.

5. **Answer "🔴 Action needed" emails fast.** Each one lists exactly what we need. Reply to the email, or call or text.
6. **Finish licensing, contracting and E&O.** If our email says you're missing any of them, start at zoopbenefits.com/zoop-crew-next, if not completed. The formal application goes in once all three are confirmed. You can also contact contracting@zoopbenefits.com for help.
7. **Help your client through underwriting.** Nudge them to finish exams, forms and medical records.
8. **Review the offer.** When it's approved, we email you the offer. Go over it with your client.
9. **Tap a button.** Each week the check-in email has buttons. Tap the one that fits once your client decides.
10. **Help with delivery.** When the policy issues, help collect the delivery items and the first premium. We email you when it's placed.

Questions anytime: NewBusiness@ZoopBenefits.com · call or text **619-673-9667**.

03 What each stage means

Every time your case moves to a new stage, we email you. When we need something from you or have good news, we text you too. Here's what each stage means and what to do.

Stage	What it means	What you do
New Submission	We have your booking and are reviewing the form.	Confirm your client got the calendar invite.
Intake Review – Info Needed	We need something from you.	Send each item in the "🔴 Action needed" email.
Contracting Pending	You need a license, carrier contract or E&O before the formal application can go in.	Finish them at zoopbenefits.com/zoop-crew-next or contracting@zoopbenefits.com .
Informal Inquiry Out	Carriers are pricing the case informally.	Nothing yet, unless our email asks you to start licensing or contracting.
Application In Progress	We're completing the formal application.	Help your client sign quickly.
Submitted – In Underwriting	The carrier has the application.	Encourage your client to finish exams and paperwork.
Requirements Pending	The carrier needs more, such as an exam, records or forms.	Nudge your client on the items in our email.

Stage	What it means	What you do
Approved – Offer Out	The offer is in.	Review it with your client, then tap a button in the weekly check-in.
Issued – Pending Delivery	The policy is issued.	Help collect the delivery items and the first premium.
Placed	The policy is in force and paid.	Nothing. Congratulations.
Case closed	The case is closed. The reason is in our email.	Call us if you'd like to talk through next options.

04 The weekly check-in buttons

Once the offer is out, you get a check-in email and text each week. Tap the button that fits after your client decides. A thank-you page confirms the tap.

Button	Tap it when	What happens next
Moving to formal	Informal offer: your client wants to apply formally. Formal offer: your client accepts.	Informal: we start the formal application. Formal: we request the policy.
Still deciding	Your client needs more time.	Nothing changes. Next week's check-in arrives as usual.
Call me	You want to talk it through.	Your Case Manager calls you within 48 business hours.
Offer not accepted	Your client doesn't want this offer but may consider another.	We call you to agree next steps. Check-ins stop.
Client said no (formal) or Not pursuing (informal)	Your client is done with this case.	We close the case and email you to confirm.
Withdrawn	The case is being withdrawn.	We close the case and email you to confirm.

- **Tapped the wrong one?** Call or text 619-673-9667 or email newbusiness@zoopbenefits.com and we'll fix it.
- **The buttons only work while the offer is out.**
- **Check-ins come weekly for 12 weeks**, then monthly, until you tap a button that ends them.

05 Before you book: a quick checklist

Run through this list before you book. Each item keeps your case from being held.

- **One insured per booking.** Book a separate appointment for every other insured.
- **A unique email and mobile for every adult.** A minor child uses the parent's, with the child's name in Insured Full Name.
- **Splits that total 100%,** with a writing number for every agent on the case.
- **Licensed, contracted and E&O current** in your client's state. If not, start now at zoopbenefits.com/zoop-crew-next.
- **Your client knows to watch for the calendar invite,** and to check spam.
- **Your own mobile on the form,** so our texts reach you.

06 Questions? We're here

Reach the New Business team any time. Fast answers mean faster offers.

HOW TO REACH US

Anything about your case: NewBusiness@ZoopBenefits.com or call or text 619-673-9667

Licensing, contracting or E&O: start at zoopbenefits.com/zoop-crew-next, or email contracting@zoopbenefits.com

Tapped the wrong button: call or text 619-673-9667 and we'll fix it