



Service Calls & Onboarding Appointment Scripts

Commercial Insurance

One thing I wanted to mention is that our agency is really good at Home/Auto insurance, but we're even better at business insurance.

We're really good at helping small businesses get business insurance with great coverage and a great price.

Do you know anyone in your circle of friends or family members that runs a business that we could talk to about their business insurance?

When They Know A Business Owner

Could you do me a favor and pass on our contact info to them? We'd love to chat with them when they're ready. By the way, do you happen to know how long they've been in business?

When They Are The Business Owner

I can set up a brief call with the Business Specialist in our agency to go over that, are you available for a quick call with them this afternoon?

Life Insurance / Tax-Free Retirement Planning

I understand that our conversation today was about something else, but I wanted to mention – in addition to Home and Auto insurance, our agency specializes in [Life Insurance / Tax-Free Retirement Planning]. That's something that our agency is really good at.

If you, or someone you know needs assistance with [Life Insurance / Tax-Free Retirement Planning], we'd be happy to help them with that.

Is there anyone you know who might be looking for assistance with [Life Insurance / Tax-Free Retirement Planning]?

I can set up a brief call with the [Life Insurance / Retirement] specialist in our agency to go over that. Are you available for a call with them this afternoon?

Medicare

I understand that our conversation today was about something else, but I wanted to mention – in addition to Home and Auto insurance, our agency specializes in Medicare. That's something that our agency is really good at.

Are you currently on Medicare?

What provider currently carries your Medicare plan? (Humana, United Healthcare, Aetna, Cigna)

Do you like [Current Provider]?

I'm not sure if you are aware of this, but [Current Provider] just released new plans that have benefits like giving you a grocery card and giving you more dental coverage, all without adding any extra cost to you.

I can set up a brief call with the Medicare specialist in our agency to go over that. Are you available for a call with them this afternoon?

Google Review

Can I ask you for a quick favor?

We are trying to get to [x] 5-star reviews on our Google page and I was hoping you could help us reach our goal.

If I send you a link to our Google page, can you leave us a 5-star review today?

Great! Are you talking on your cell phone right now?

Perfect! I just texted you the link to your phone, can you confirm that it came through?

Wonderful. First click on the link that I sent you, then click on Reviews, and you'll be able to leave us a review right there.

We read these reviews every morning as a team, and it would mean the world to us if you left us a review!

Referral

Are you satisfied with the quality of service that we provided today?

Would you happen to know of anyone that I could give an insurance quote to, and help them the same way that we helped you?

Just so you know, for every person you refer our way who gets an insurance quote from me, I'll be happy to send you a \$10 gift card as a token of appreciation (even if they don't switch their insurance to us).

Do you have any family, friends, or coworkers in mind that you might consider referring to me?