



# 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?