

Hi, (Mr. or Mrs. Client), (*slight pause*) this is YOUR NAME calling on behalf of AGENCY NAME

We handle your homeowner's policy and I see that it is coming up for renewal in the next couple of months. I am going to be out in the THEIR NEIGHBORHOOD/AREA NAME this week, next week, etc.; and was planning on dropping by either Tuesday or Wednesday (*or whatever two days*) to give you a copy of your current declaration page and complete your coverage review so that our office can efficiently and effectively renew your coverage. It's pretty basic and only about a 15 or 20 minute get together. Which evening works better for you, Tuesday or Wednesday?

Tuesday... great! Now my schedule for Tuesday is filling up but I still have a few times left. I can do x:15 or y:15. Which do you prefer? (*wait for an answer*)

OK. x:15 it is then. I will put it in my book for Tuesday the DATE at x:15pm. If you could go ahead and mark it down somewhere as well for Tuesday the DATE at x:15pm that would be great.

Oh, and just to confirm, you are at 123 Main Street from what I see here, correct?

Great. I have it down for Tuesday the DATE at x:15pm and I look forward to seeing you then. Bye-bye.

*That's it!*

A couple of notes:

Remember, these people are already clients and now policyholders, and you need to act with familiarity.

DO NOT get into a discussion about anything else over the phone!

DO NOT ask about or pre-judge their health or insurability over the phone!

You are simply setting up a time to go and see them to deliver their policy/declaration page. The rest of the process must take place in person when you visit with them.

Objections:

"Do we have to see you"?

It's not required but I do recommend it and it is only about a 15 or 20 minute get together so would DAY DAY work better?

If "No" then be very polite and positive and say "No problem, I will mail out the additional coverage questionnaire to you. Please fill it out and send it back in to us so we can update your file...and again, thank you for your business.

You then mail out the Coverage Review Questionnaire and note the file.

