

The following script can be used to call clients that were sent a mailing and have not yet responded within approximately 10-14 days.

Phone Call Mailer Follow-up Script:

Hi (Mr. or Mrs. Client), this is _____ **YOUR NAME** _____ with _____ **AGENCY NAME** _____, we are your home and auto insurance agency and we are in the process of updating your file. We recently sent you a letter and I wanted to ensure that you did receive it and had a chance to look it over? *(Slight pause)* Do you recall getting the letter and have you had a chance to look it over yet?

We are trying to open the door to discuss having a life affiliate visit them and bring the letter to them again if needed to have it filled out if they didn't complete it or don't recall getting it. Why are we doing this for them? Because it is important to keep their files updated and current so as to service the client to the absolute best of our ability.

If the answer is "Yes" then say:

"Great!" Did you send it back in yet because I don't see that we have received it?

At this point, offer to go out and personally pick it up (or have your life affiliate drop by to pick it up) and review with them in person! Make sure you communicate in a non-obligatory manner.)

Set the appointment!

If the answer is "No" then say:

"That's OK. For one odd reason or another some folks seem not to have received them. No worries though, that's part of the reason for my call, I will drop by (have our life affiliate drop by) with the letter and fill it out with/for you so that we can have your file as current as possible and keep up that good service you deserve from us!"

Set the appointment!

Make sure you speak in an upbeat, positive, assumptive tone here!! It is VERY, VERY IMPORTANT that you do that!

It really is that Simple! Remember, results are what you create through a positive, upbeat attitude! Also remember that every one of these people buys this protection so why shouldn't they be buying it from you since they already do business with your agency. Don't let them go buy what they need from someone else when they could have gotten it from you!