

Through your agency's partnership with P&C Life Writers, you now have a dedicated life affiliate that will help you provide additional services to your clientele. As a CSR, you have a tremendous opportunity to increase the profitability, client persistency and positive image of your agency. We are here to help and assist you in a number of ways. Your life affiliate is available any time to answer questions or help with any facet of the program.

The following scripts will help you easily make your clients aware of the value-added services you can now offer them. A simple recommendation from you is all it takes, and then your life affiliate will take it from there and do all of the heavy lifting.

## Sample Scripts

1) "By the way, we are now offering the additional expert services of \_\_\_\_\_ LIFE AFFILIATE NAME \_\_\_\_\_ who is our life affiliate. I can have him give you a call for a FREE life coverage review and customized needs analysis for you ..... (slight pause). Shall I go ahead and have \_\_\_\_\_ LIFE AFFILIATE NAME \_\_\_\_\_ give you a call?" (CSR should then make note in file as to s "yes" or "no" and date asked.)

Another option is to customize to the client's personal situation... for example:

- 1) Homeowners: "Have you received a quote on your mortgage protection yet? No?  
We have \_\_\_\_\_ LIFE AFFILIATE NAME \_\_\_\_\_ our mortgage protection specialist and I am going to have him give you a call with this info."
- 2) Small business owners: "We are now proud to offer "buy sell" and "key man" policies for all of our small business owners? I can have our specialist \_\_\_\_\_ LIFE AFFILIATE NAME \_\_\_\_\_ contact you for a free quote or review? When shall I have him/her contact you?"
- 3) "We are now proud to offer income replacement coverage to all of our clients. I will have our specialist \_\_\_\_\_ LIFE AFFILIATE NAME \_\_\_\_\_ give you a call and set up a time for your free needs analysis and review."
- 4) "We are now pleased to offer critical illness coverage to help pay the mortgage in the event that you or your spouse is diagnosed with a critical illness. I will have our specialist \_\_\_\_\_ LIFE AFFILIATE NAME \_\_\_\_\_ give you a call and set up a time to drop by your free information on how it works."

Just a note. You want to be friendly as always, but also matter of fact and assumptive. EXPECT them to say "Yes" and they will.

