**Text Script for Amazon Gift Card Offer:**

HI \_\_\_\_\_, this is \_\_\_\_\_\_\_. Just wanted to drop you a quick text & let you know I’m working part time helping people with their home & auto insurance. Our agency, Strategic Insurance, has a $27 Amazon Gift Card Offer now to review your home/auto insurance. I can fill you in on the details, when is a good time to chat? Thanks!

**Text to Center of Influence (Realtor, Mtg broker, Attorney etc):**

HI \_\_\_\_\_\_, just wanted to drop you a quick text to touch base & let you know I got my insurance license and am helping clients with their home & auto insurance. What’s your calendar like for a Zoom meeting to learn more about how we may be able to cross refer business to each other?

**Call to X Date:**

**Subject: Your Policy Renewal**

**Hi\_\_\_\_**

**Our records indicate your home or auto insurance is coming up for renewal & your not currently insured with our agency.** Just wanted to drop you a quick (call,text, email) & let you know we have a $27 Amazon Gift Card Offer now to review your home/auto insurance & see if we can save you some $$$. Is now a good time to chat, & I can fill you in on the details? IF not, What’s the best time to discuss? Thanks!

**Email/Text to X Date:**

**Subject: Your Policy Renewal**

**Hi\_\_\_\_**

**Our records indicate your home or auto insurance is coming up for renewal & your not currently insured with our agency.** Just wanted to drop you a quick (call,text, email) & let you know we have a $27 Amazon Gift Card Offer now to review your home/auto insurance & see if we can save you some $$$. What’s the best time to discuss? Best #? Thanks!

**Email/Letter to COI’s you ALREADY know (realtors, mortgage, attorney, financial advisor, title company)**

Subject: Checking in…

Hi \_\_\_\_\_\_,

Wanted to drop you a note & check in how you are doing with quarantine life now?

It’s been awhile since we have spoken & I just wanted to drop you a note & let you know I’m excited to now be helping families with personal insurance (home, auto, flood, umbrella, & boat insurance).

I am now a licensed Personal Lines Agent with the state & Home & Auto Sales Specialist with Strategic Insurance. ([www.GetStrategicIns.com](http://www.GetStrategicIns.com))

They are one of the Top 25 agencies as ranked by the Tampa Bay business journal, have over 195-5 Star Google Reviews & really care about their clients. I’m able to assist clients with over 25 companies for home & auto insurance & would appreciate you keep me in mind for any clients you have that need help with their personal insurance.

What are good for referrals for you at this time?

Let me know what your schedule is like next week or the following week for us to get together on a Zoom meeting & chat more about how we can network & help each others business.

Have a great day!

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email to contacts/prospects/memory jogger etc for Amazon Gift Card Offer:

Subject: $27 Amazon Gift Card

Hi \_\_\_\_\_\_\_\_\_\_

Just wanted to drop you a note & let you know I’m excited to let you know I’m now licensed & working with clients to help them with their home, & auto insurance. Our agency, Strategic Insurance, has a great track record working with clients. “Google” them! Currently our Agency is offering a $27 Amazon Gift Card to review & quote your home/auto insurance.

**Option 1: I’m new & know what you are thinking already**.

I’d be happy to help with that review & work with a Team Leader here so there’s no concern IF you are thinking I’m new & what do I know about insurance?! First off, more than you think! Secondly there’s a great support team here to help newer team members like myself.

Here’s a link to the website which has all the details on this.

[Click Here for Amazon Gift Card Offer submission.](https://www.getstrategicins.com/amazon-gift-card-challenge/)

Anyway the worst thing we can do is save you $$ & you walk away with a $27 Gift Card for me doing the market review for you! 😊.

Have a great day!

PS. Call or text me if any questions.

Your Name & Info below…

**Option 2: Straight Forward:**

Here’s a link to the website which has all the details on this.

[Click Here for Amazon Gift Card Offer submission.](https://www.getstrategicins.com/amazon-gift-card-challenge/)

Anyway the worst thing we can do is save you $$ & you walk away with a $27 Gift Card for me doing the market review for you! 😊.

Have a great day!

PS. Call or text me if any questions.

Your Name & Info below…

**For Recruiting Door Opener/Convo starter:**

How’s quarantine life? How’s work?

**For Recruiting Follow-up:**

Text/PM/Email:

Hi Isabel- wanted to touch base with you about the home & auto insurance opportunity that Vianna referred you to us? Haven't heard back from you? Keep me posted. Hope all is well!

**Script for ASKING for REFERRALS: WITH a client you just wrote insurance for:**

WORD TRACK: “I’m looking to grow my business with other great clients like yourself thru referrals. Who else can you think of that may be interested in a policy review & taking our Amazon Gift Card Challenge? (IE. Friends, family, neighbors, co-workers, etc etc).

Script for Asking for referrals even IF you DID not write the client:

WORD TRACK: “Thanks for the opportunity to review your insurance. I’ll pend your info in our system & follow-up with you pro-actively, closer to your next renewal. I’ll also send your info to our Operations Mgr for your Amazon Gift Card. What’s the best email or cell # for them to send it to? Lastly, I’m looking to grow my business with other great people like yourself thru referrals. Who else can you think of that may be interested in a policy review & taking our Amazon Gift Card Challenge? (IE. Friends, family, neighbors, co-workers, etc etc).

Script for approach to COI’s for Professional Sellers Program (Realtors, Mtg Advisors, Bookeeper, CPA, Attorneys, Financial Advisors, etc)

**Follow-up for someone who has had an opportunity meeting & then got sent the Advisor agreement for follow-up**

-text them 1 day after the Docusign is originally sent with this:

Hey first name this is Brianna from Strategic Insurance. As Onboarding Leader I’m here to help new advisors with any questions. wanted to make sure you got the Docusign 1099 Advisor agreement I sent ? What questions do you have?

Then 3 days later I would text:

Hey first name it’s Brianna with Strategic Insurance. Wanted to check status with you as we haven’t gotten the signed 1099 Advisor Agreement yet. Should we close your file or are you still considering joining our team doing home & auto insurance?

After that I would stop follow up and keep moving.

Based on their answers we could also have a list of people who say not right now but may be interested in future.

For those people we would want to pend and touch base in 3-6 months.

Doug.

Script for calling X-Dates:

Hello \_\_\_\_\_\_\_\_\_\_\_. My name is Brad Carver & I am with Strategic Ins services. We quotes your \_\_\_\_\_\_\_\_\_\_ back in (Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_) & would like an opportunity to quote that line of business again for you to see if we can save you some money.

Would you be interested in switching your insurance, IF we could save you some money? IF yes, go into updating info. IF no, would you be interested in getting our free monthly newsletter about finances & insurance that impact you & your family? IF yes verify email address.

I wanted to verify what the best email & contact phone number would be to follow-up with you

Script for calling Ho3 with no auto ins- Amazon Gift Card Offer

Hello \_\_\_\_\_\_\_\_\_\_\_. My name is Brad Carver & I am with Strategic Ins services. We currently insure your home & would like to see if you want to participate in our Amazon Gift Card Challenge? Simply put we offer a $27 Amazon Gift Card for the opportunity to review your auto insurance & see if we can help save you money.

You can switch auto insurance at anytime without penalty. We have a network of 6 carriers & can often times save clients money & help get them better coverage. IF No, thank them for their current business & find out when their policy is up for renewal & ask them if we can quote their auto when they come up for renewal. IF yes, go right into taking info: (auto quote sheet)

Script for calling FMAP’s:

Hello \_\_\_\_\_\_\_\_\_\_\_. My name is Brad Carver & I am with Strategic Ins services. You recently requested a quote online looking for homeowner’s insurance thru the Fla Mkt Asst Plan. We have a network of over 10 carriers & would like an opportunity to help you with insuring your home. Here is what we need (confirm info on FMAP sheet & contact info).