

Expert Content Strategy Guide

Insurance Policy Quote Follow Up



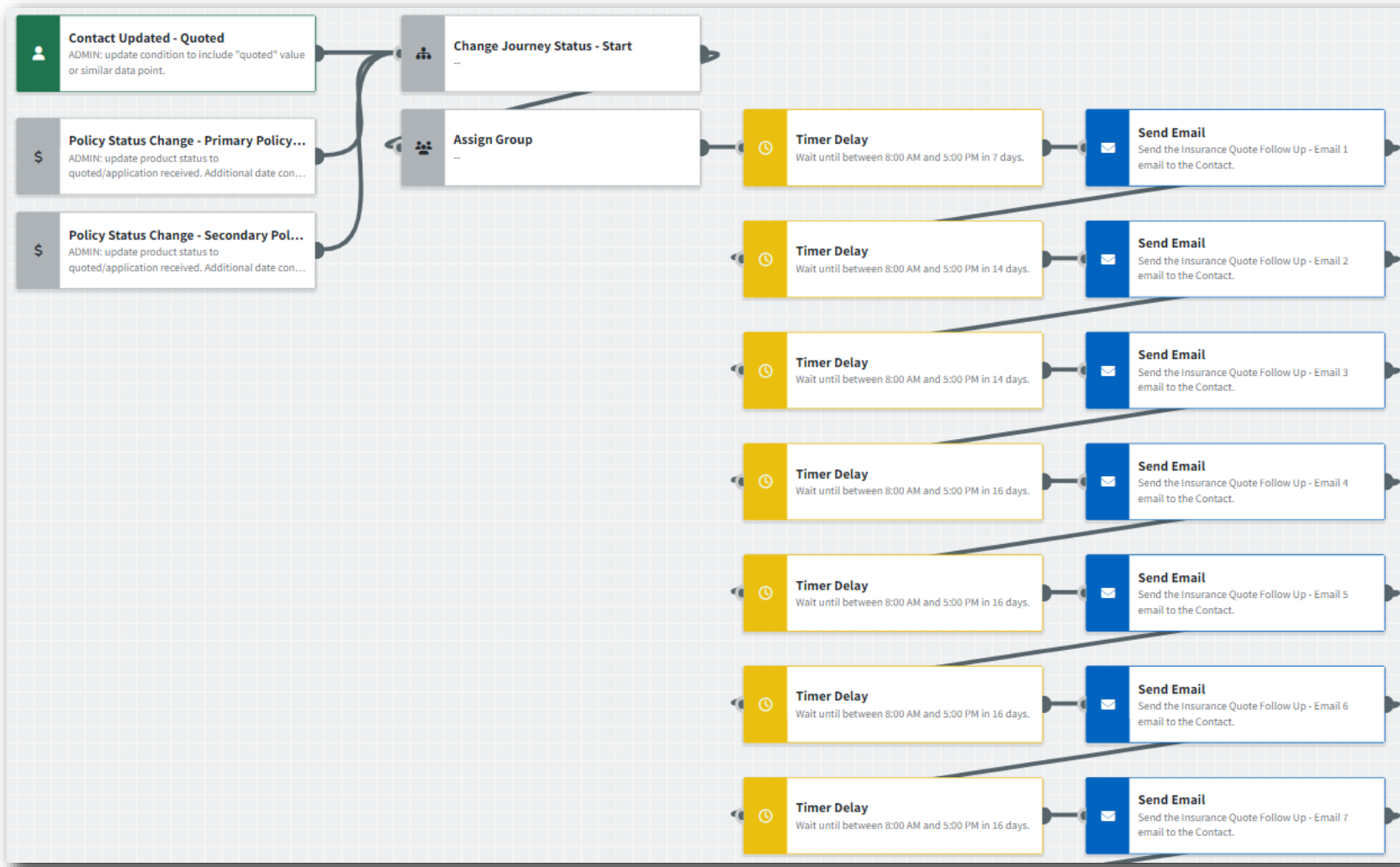
Insurance Policy Quote Follow Up

Email

Engage contacts who have requested a policy quote but have not bound the policy. A series of 7 emails sent over the course of 90 days will be sent on behalf of agents. Topics range from simple follow ups, policy bundling, and quote refreshes. There are some emails where specific insurance type will need to be added or a custom field for policy type should be incorporated.

Best practice is to layer in SMS and user notifications where it makes the most sense for your business.

*All communications should be reviewed prior to initiating the journey.



Journey Map Notes:

- Keep emails that work for your organization, swap with custom, or add these emails to your existing campaigns.
- Adjust onramps with organization specific groups and Focused View outcomes.

Insurance Policy Quote Follow Up



Dear Teddy,

Recently, you requested a quote for insurance coverage. I haven't heard back from you, so I'm writing to check and see if you have questions about the quote or the coverage it will provide. (If you forgot you asked for this quote, I promise not to embarrass you.)

In addition to competitive rates, we offer personalized customer service. When you choose Expert Content, you'll receive coverage for real peace of mind, plus the assurance that we're always here to answer your questions and solve problems.

I also wanted to remind you about your potential savings if you "bundle" all your insurance with one agent. Call me and find out how much you'll save. Feel free to reply to this email or call me at at your convenience.

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Hello Teddy,

A few weeks ago, you requested a quote for insurance coverage. I haven't heard back from you, so I thought I'd check in and offer my assistance.

I can also sweeten the deal by offering reduced rates for two or more insurance premiums. This is called "bundling". You can save a bundle when you buy your auto and homeowner's insurance (or auto and renters) from me.

Want to find out more? I'd be happy to review the quote with you, or explore other options that might better fit your needs.

Best regards,

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Dear Teddy,

You didn't really say that, did you?

Let's face it. Everyone loves a bargain, and insurance is included. Better yet, you'll be impressed by our fast, friendly customer service.

The next time you have 10 minutes to spare—like right now—call me at and tell me what type of coverage you're looking for.

Talk soon,

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Hello Teddy,

I just noticed that you haven't responded to your [insurance type] quote I sent you a couple of months ago. If you've decided not to pursue it, that's cool. Just click on unsubscribe.

But before you click, please take a minute to see why calling me could improve your insurance coverage and your mood.

1. My new clients are thrilled when I return their calls in minutes instead of days.
2. I can explain terms like deductible without putting you to sleep.
3. I think you'll be impressed when you learn how much you can save.

I'd love to brighten up your day, so let's talk about how I can do this in just minutes.

Warm regards,

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Email Subject:

- A better deal on insurance is waiting.
- Inside: some really good reasons to review your insurance quote.
- "I don't mind spending too much for insurance."
- Here's why I'm busy...and why you should call.

Insurance Policy Quote Follow Up



Dear Teddy,

I wanted to remind you about the insurance quote you requested a while ago, as I would still like to discuss how you can improve your coverage.

Also, I have news for you about our multi-policy discounts. By bundling multiple policies (like home and auto), you could save up to [X]% on your premiums. You can find out just how much you'll save in just minutes.

No matter what you decide, you'll receive personalized, friendly service and a quick callback every time you contact me.

Looking forward to hearing from you,

Media Team Admin



Hello Teddy,

Life can change quickly, and so can your insurance needs.

Since you requested a quote for [insurance type] a while ago, have there been any significant changes in your life? New home, car, job, or family additions?

If the original quote I sent you is a bit stale, let me know. I can provide a fresh, updated quote for you to consider.

Best wishes,

Media Team Admin



Hello Teddy,

Since there are plenty of reasons you may have overlooked the [insurance type] insurance quote I sent you, I wanted to reach out to you one last time.

If you're still interested or if your needs have changed, I'm here to help. If not, no worries.

Our agency's built a solid reputation on customer service, so you can rely on a fast, friendly response any time you contact me for a quote, or answers to any insurance questions.

Best regards,

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Email Subject:

- Bundle your coverage. Save a bundle.
- Let me freshen up that insurance quote for you.
- This could be your last chance for a good buy.