

# Expert Content Strategy Guide

*Insurance Policy Renewal*

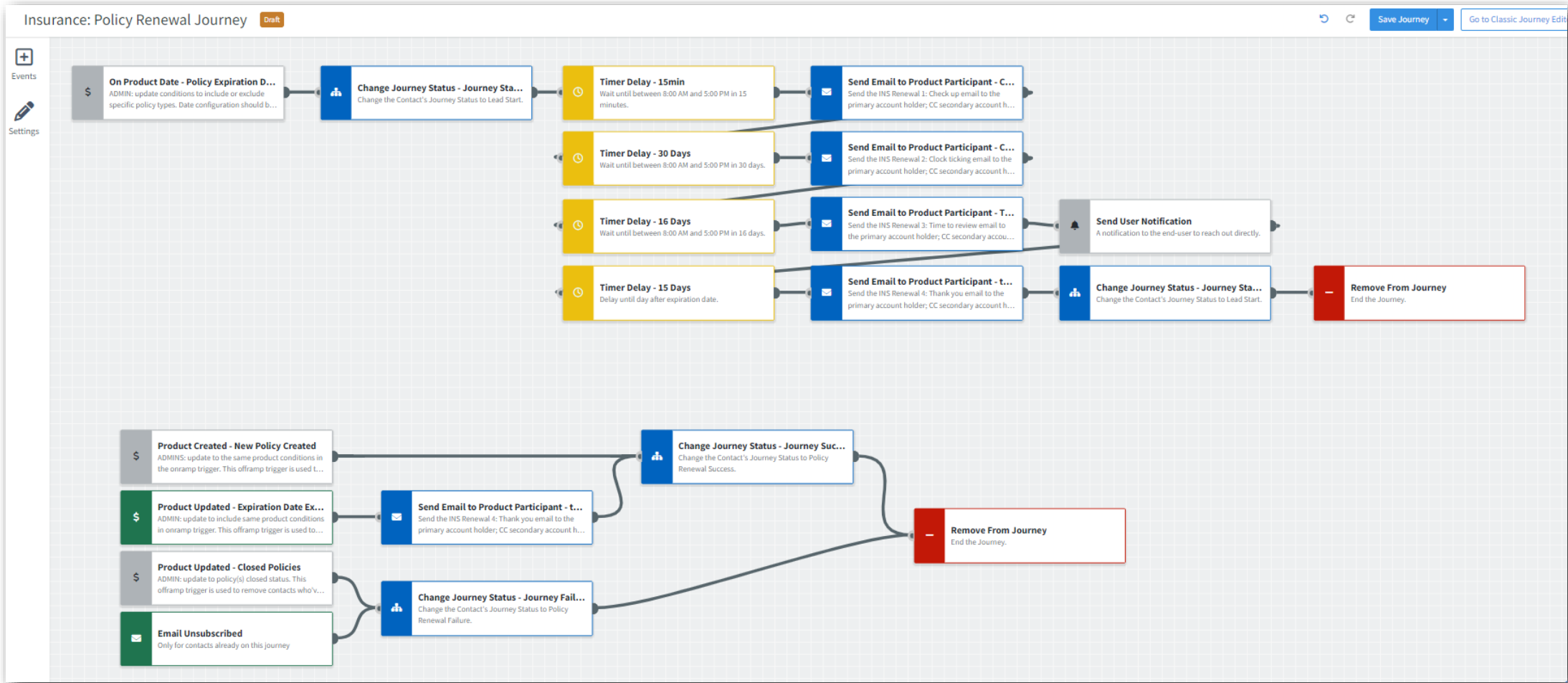


# Insurance Policy Renewal

## Emails, user notification

Leverage this journey to remind policyholders of upcoming renewals on their policies. Admins should configure journey triggers to include or exclude specific policy types (e.g. Medicare policies go through their own renewal journey and reminder cadence). Emails are generic to policy type and can be customized further with relevant data. 3 emails sent beginning 60 days before the policy expiration date. Timer delays are aligned with email verbiage alerting policyholder of how many days they have until the policy auto-renews. A thank you is sent on the day after the expiration date as long as no changes have been made to the policy.

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



## Journey Map Notes:

- Keep emails that work for your organization, customize the content as needed, swap out with custom, or leverage these emails in your existing campaigns.
- Timer delays are based on onramp being 60 days prior to policy expiration date. If onramp date shift is changed, admin should review and adjust all timer delays to match.

# Campaign Name



Hi,

Now would be a great time to talk about your insurance needs and ensure you've got the right coverage.

Life happens to all of us – taking a step back and looking at your insurance coverage is very important. Whether you would like to explore opportunities to bundle coverage and save, or align your deductibles with your financial situation, I'm here to help.

I'm available to talk about your insurance needs at your convenience, so reach out any time!

Thank you,  
Monica Insurance

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Monica Insurance  
NPN# 123456 | Insurance Agent  
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1600 Utica Ave S St. Louis Park, MN 55426  
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SCHEDULE AN APPOINTMENT





FILE CLAIM    QUICK QUOTE    PAY YOUR BILL



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Hi,

I hope this email finds you well. Is your insurance performing for you in the ways that you need?

Your policy with Expert Insurance will auto-renew in 30 days, and I want to make sure you are getting everything out of your policy that you need. Is your coverage adequate for your needs? How are your deductibles – are they too high if something were to happen? Would bundling coverage save you money in the long run?

I'd be happy to have a conversation with you about your coverage and make sure you're comfortable with your policies. Please reach out with any concerns or questions you may have before your policy auto-renews.

Thank you for trusting Expert Insurance with your insurance needs.

Monica Insurance

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Hi,

With your policy set to auto-renew in 14 days, I'm checking in to make sure you have the coverage you need. There's still time to make any necessary changes before your policy renews on [renewal date].

If you have any questions about your coverage or would like to discuss your policy, including possible ways you can save by bundling policies, please reach out at your convenience – I'd be happy to discuss options with you.

Thank you,  
Monica Insurance

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Hi,

Your policy with Expert Insurance has recently renewed with us and I wanted to thank you for being our customer.




I understand that you have a lot of choices for your insurance needs – and I appreciate your business.

If I can be of assistance with your active policy or if you would like to review options at any time in the future, please do not hesitate to reach out to me directly at 000-000-0000.


Thank you,  
Monica Insurance

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## Email Subject:

- Time for a check-up?
- The clock is ticking
- It's time to review your policy
- Thank you for being a customer

# Campaign Name

**User Notification: notification snippet name**

{{contact.f\_name}} {{contact.l\_name}} has an upcoming policy renewal date! Reach out to them to see if they need any help with adjusting their policy or learning about other offerings.

{{contact.f\_name}} {{contact.l\_name}}

Cell: {{contact.phone\_cell}}

Email: {{contact.email}}