

Access Assurance Group – Appointment Setting Script

EXAMPLE CLIENT for purposes of script practice:

JAY COPELAND
Copeland Insurance Agency
Kansas City Metro Area

“Client” = OUR CUSTOMER
“Prospect” = call sheet TARGETS

1)GET PAST THE SCREENER!

Hi, is (insert prospect’s first name on call sheet) there?

Gatekeeper/secretary: (who is this, from where, etc)

This is [your name] from (insert clients agency–name the agency AND LOCATION)

Example: (“this is Matt Byron from Copeland Insurance Agency in Kansas City”)

***If asked why you're calling....

“We’re just keeping in loose contact with some other local P&C agencies. Nothing pressing if he’s busy. ”

=====
once the owner answers
=====

Hi, Mr./ Mrs [listing name]this is [YOUR NAME] from [CLIENT’S] agency.
Does our name ring a bell by any chance?

(Pause)

So, this may come as of out of left field..., but we are starting to 'put the feelers out' in the Kansas City and the surrounding areas....
And we were wondering,

If we were to make you THE RIGHT KIND of offer, is there any chance that you might consider parting with your book within the next 12or even 24 months?

[If NO] tell them thanks, have a good day and a good rest of your season. Always be super nice if they say no.

If YES

Ok, nice. Jay Copeland – he's the owner of our agency, was hoping to just touch base with you, maybe in the next week or so.....just to see if there is some common ground...

****QUALIFYING Questions—don't pause or ask if you can ask him a couple questions, just roll right into them....acknowledge their responses but show no excitement.**

1. Do you do mainly personal or commercial lines?
2. What kind of split would you say you do between the two?
3. Who are your main carriers?
4. Mainly standard carriers though?
5. And You're fully independent, right?
6. Do you have staff there?
7. Is this the best number to reach you or is there a direct number he can call?
8. Just so I can give JAY [CLIENTS FIRST NAME] a vague idea:

before your call, "BALLPARK--where do you guys fall in annual commissions? (**If they don't want to answer, don't push, move on....)

9. I can send you over a calendar reminder that he'll be calling you...what's your email, sir?

10. Is [PICK A DAY in the next week, 2-3 days out is fine] a good time for him to call and introduce himself?

Okay, well I'm glad I caught up with you today.

Thank you so much, [PRACTICE CLIENT FIRST NAME] looks forward to speaking with you next [DAY YOU SET THE MEETING FOR]

**Additional Info for Consideration:

Face to face meetings are possible. If they're nice, feel free to shoot for the F2F (face to face meeting), it's an extra \$25 if the meeting happens. Its easy to ask if they have time for a coffee, bagel, or quick lunch courtesy of our client.

*(**If you ask them and they write for "Non-Standard" carriers- Ask – what type of policies? (might be high risk or trucking policies, or aviation, etc—"NON-STANDARD" means writing a type of insurance policy which requires industry expertise **outside** of the insurance realm. Every insurance agent who sells home or auto policies understands how to write those quotes and how to manage that type of policy. Imagine though, an insurance policy for a nuclear power plant or a traveling circus...frequently **our clients** would be lacking such specific expertise....so we verify that the prospect in question writes for "STANDARD CARRIERS" AKA–regular old personal and business insurance.)*

Non standard = anything requiring specialized expertise outside of insurance or high risk policies.

Voicemail–GO SLOW:

“Hi, [prospect name], this is [your full name]...I’m from another local P&C agency. Quick question but nothing pressing, not about a customer. Gimme a ring back if you get a second, [your number]

“Thank you”