



Cold Call Phone Script

Section 1: Approach

First Call

Hello, **(Their Name)**, this is **(Your Name)** with [Agency Name], and I know that you weren't expecting my call today, but would you hate me if I told you I was calling about your Homeowners?

Follow-up

Hi **(Their Name)**, this is **(Your Name)** the [Agency Name]. You may recall that **(Review Previous Conversation)** you didn't have time to get into it then, is now a good time to talk?

Section 2: Call Purpose

(Their Name), Your name came across a report in our office that says your home insurance is up for renewal soon. We're seeing rates across Illinois seeing rate increases and I wanted to see if my team and I could put together a few solutions for you.

Section 3: Ask for the information

If you have time to answer 6 questions, I can begin working on that quote for you.

Assume the next step, we already have their Name and phone number, move on to what you don't know.

1. **(Their Name)**, can you confirm your address for me?
2. What is your date of birth?
3. Are you married?
 - a. What is your spouse's name?
 - b. And their date of birth?
4. How long have you lived at this address?
5. Who's your current carrier?
6. How much was last year's premium?

I will let you know one of the greatest ways to get a discount on your home insurance it to have your auto and home insurance with the same company. But I will get working on this right away and we can worry about the auto insurance if/when this makes sense.