# PURCHASE A CAR

## New Prospect Referred to by Auto Dealer

### EMAIL

Hi (INSERT FIRST NAME)

Congratulations on your new car! (INSERT REFERRAL NAME) referred you to our agency and thought we could help you get the right insurance to protect you and your new vehicle.

We know that finding the right insurance coverage can be tricky, and at (INSERT AGENCY NAME) we will work to find you the right policy for the right price and make sure you understand exactly what your coverage entails.

If you would like to talk about getting coverage for your new car, you can email me at (INSERT EMAIL ADDRESS) or use my calendar link to schedule a meeting (INSERT CALENDAR LINK). Or please feel free to call our office at (INSERT PHONE NUMBER).

I look forward to working with you! Best,

### LETTER:

Hi (INSERT FIRST NAME),

Congratulations on your new car! (INSERT REFERRAL NAME) referred you to our agency and thought we could help you get the right insurance to protect you and your new vehicle.

We know that finding the right insurance coverage can be tricky, and at (INSERT AGENCY NAME) we will work to find you the right policy for the right price and make sure you understand exactly what your coverage entails.

To schedule a time to talk about your insurance needs please email me at (INSERT EMAIL). Or call our agency at (INSERT AGENCY PHONE NUMBER) and we will be able to help you with your needs.

I look forward to working with you! Best,

## Current Customer that Lacks Auto Insurance with Agency Bought New Car

### EMAIL

Hi (INSERT FIRST NAME),

Congratulations on your new car! Would you like to talk about options for insurance coverage?

We want to make sure you have the right coverage to protect you and your vehicle. Given your other coverage with our agency, there might be opportunities to bundle coverage and get you savings.

If you would like me to get a quote started for you, please send me the following information:

* Year, Make Model
* Are you financing, leasing or own
* Estimated weekly milage
* Vehicle identification number

And of course, please feel free to call me at (INSERT PHONE NUMBER) if you have any questions or would like to discuss your options right away.

Best,

### LETTER:

Hi (INSERT FIRST NAME),

Congratulations on your new car! Would you like to talk about options for insurance coverage?

We want to make sure you have the right coverage to protect you and your vehicle. Given your other coverage with our agency, there might be opportunities to bundle coverage and get you savings.

If you would like me to get a quote started for you, please email me at (INSERT EMAIL ADDRESS) the following information:

* Year, Make Model
* Are you financing, leasing or own
* Estimated weekly milage
* Vehicle identification number

Or please feel free to call me at (INSERT PHONE NUMBER) to discuss your options right away. Best,

### TEXT MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME) from (INSERT AGENCY NAME). Congrats on your new car! Do you need help with insurance? We can offer great coverage and likely save you money. Let me know if you want to set up a time to talk. Or if you would like a quote, fill out this online form and I will get started on it right away (INSERT LINK TO FORM).

### VOICEMAIL MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME) from (INSERT AGENCY NAME)*.* Congratulations on your new car. Would you like help with insurance? Given your other coverage with us, we might be able to save you money. Please give me a call at (INSERT PHONE NUMBER) and we can discuss options. You also have my email so feel free to reach out that way if that is easier. I look forward to hearing from you.

# ONBOARDING

### EMAIL

Hi (INSERT FIRST NAME),

Thank you for choosing (INSERT AGENCY NAME). We look forward to working with you.

Attached please find information about your insurance. I am also happy to have a call or meeting with you to review the policy and answer any questions you might have.

We also wanted to share some additional information about our agency that might be helpful as we continue to work together:

We’re in the office (INSERT OFFICE HOURS). If you need to get in touch with us after hours (INSERT INFORMATION HERE).

We regularly share helpful tips as well as important updates on (INSERT SOCIAL MEDIA LINKS). Please make sure to follow us.

We have a client portal where you can view and access your policies and provide updated information that might impact coverage. (INSERT PORTAL INFORMATION)

For additional information about working with us, check out our FAQs (INSERT LINK TO INFORMATION).

We also want to make sure we have on file the best way to get in touch with you. Please send us a quick email and let us know whether you’d like to receive emails, phone calls, text messages or all three, and we will make sure to use that as our primary mode of communication with you. (INSERT EMAIL).

Best,

### LETTER:

Hi (INSERT FIRST NAME),

Thank you for choosing (INSERT AGENCY NAME). We look forward to working with you.

Enclosed please find information about your insurance as well as resources about filing a claim and FAQs about working with us.

If you have any questions about your policy or if you would like to review it more in depth, please feel free to call me at (INSERT PHONE NUMBER)*.*

Here’s some additional information about our agency that that may be helpful:

Our office hours are (INSERT HOURS). If you need to get in touch with us after hours (INSERT INFORMATION).

We regularly share helpful tips as well as important updates on (INSERT SOCIAL MEDIA LINKS)*.* So please make sure to follow us.

We have a client portal where you can view and access policies and provide updated information that might impact coverage. (INSERT PORTAL LINK)

If you prefer to go paperless and receive documents through email, please let us know (INSERT EMAIL AND PHONE CONTACT INFORMATION).

Best,

# ANNUAL REVIEW

### EMAIL

Hi (INSERT FIRST NAME),

I hope this email finds you well. It is that time of year—time to review your auto insurance policy and review your coverage. Your policy expires on (INSERT DATE). Let’s start the renewal process to ensure that there is no lapse in coverage.

We want to make sure your information is up-to-date so we can get you the best coverage possible. Please email me (INSERT EMAIL) if you have had any changes that can impact your policy. These might include: adding or removing drivers, changes in the mileage you drive, and more.

I am also happy to have a call to discuss (INSERT PHONE NUMBER). If you have any questions, please don’t hesitate to reach out.

Best,

### LETTER

Hi (INSERT FIRST NAME),

I hope all is well. It is that time of year: time to review and renew your auto insurance policy. Your policy expires on (INSERT DATE) so we want to start the renewal process to make sure there is no lapse in coverage.

We want to make sure your information is up-to-date so we can get you the best coverage possible. Please call me at (INSERT PHONE NUMBER) or email me at (INSERT EMAIL) to let me know if you have had any changes that might impact your policy. This may include adding or removing drivers or changes in miles driven.

If you have any questions, please don’t hesitate to reach out. Best,

### TEXT MESSAGE WITH COLLECT INFORMATION

Hi (INSERT FIRST NAME). It’s (INSERT NAME/AGENCY NAME). Your auto policy expires on (INSERT DATE) and we would like to start the renewal process. Please fill out this form to let me know if you have had any changes and I will begin working on quotes. (INSERT LINK TO FORM)

# BUYING A NEW CAR

### EMAIL

Hi (INSERT FIRST NAME),

Are you thinking about buying a new car? There are a variety of things you can consider to optimize your insurance costs. Not only will the make and model impact premiums but some carriers also offer discounts for environmentally friendly vehicles.

Check out our FAQ about purchasing a new car and insurance (INSERT LINK TO RESOURCE).

Once you make the selection, we can assist with reviewing and updating your policy to include the new car.

If you have any questions, don’t hesitate to reach out. Feel free to email me or call me at (INSERT PHONE NUMBER).

Best,

### TEXT MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME/NAME OF AGENCY). Are you thinking about buying a new car? Our fact sheet on purchasing a new vehicle and insurance might help. And if you have any questions, please don’t hesitate to reach out. (LINK TO RESOURCE).

# 5: SELLING OR TRADING A CAR

### EMAIL

Hi (INSERT FIRST NAME),

Are you thinking about selling or trading in your car? If so, don’t forget about the changes that need to be made to your insurance.

If your car is still registered to you even after you sell it, you will need to keep the insurance or risk fines. If you aren’t buying another car right away, instead of canceling your policy you might want a non-driver policy as a lapse in coverage could impact your rates.

For tips on insurance considerations for selling or trading in your car check out our fact sheet (LINK TO RESOURCE).

If you have any questions, please don’t hesitate to reach out. You can email me or call me at (INSERT PHONE NUMBER).

Best,

### TEXT MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME/AGENCY NAME). Are you thinking about selling or trading in your car? Handling the insurance after the sale might not be as straight forward as you think. For information about how the sale might impact your insurance and the best options for coverage check out our fact sheet. (INSERT LINK TO RESOURCE).

# 6. ACCIDENT

### EMAIL

Hi (INSERT FIRST NAME),

No one likes to think about car accidents. But being prepared beforehand and knowing what steps to take when one occurs can make the claims process faster and easier.

Most importantly, your health, your passengers’ health, as well as others who might have been involved in the accident are the top priority. If there are any serious injuries call 911. If not, contact the authorities to report the accident.

Take pictures of any damage and exchange insurance information with the other parties involved. If you need to file a claim, submit the information directly to your insurance carrier. We can assist you with the claims process, but it is important that your insurer has the information as soon as possible so they can start the process.

For more tips on what to do if you are in an accident, check out our fact sheet which will walk you through the steps you should take after an incident (INSERT LINK). We suggest that you print it out and store it in your glove compartment so you can reference it at any time.

If you have any questions, or need our help, please don’t hesitate to call us at (INSERT PHONE NUMBER). Best,

### LETTER

Hi (INSERT FIRST NAME),

No one likes to think about car accidents. But being prepared beforehand and knowing what steps to take can make the claims process faster and easier.

Most importantly, your health, your passengers’ health as well as others who might have been involved in the accident are the top priority. If there are any serious injuries call 911. If not, contact the authorities to report the accident.

Take pictures of any damage and exchange insurance information with the other parties involved. If you need to file a claim, submit the information directly to your insurance carrier. We can assist you with the claims process, but it is important that your insurer has the information as soon as possible so they can start the process.

For more tips on what to do if you are in an accident, enclosed is our fact sheet which will walk you through the steps you should take after an incident. We suggest that you store it in your glove compartment so you can reference it if an accident does occur.

If you have any questions, or need our help, please don’t hesitate to call us at (INSERT PHONE NUMBER)*.*

Best,

### TEXT MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME) from (INSERT AGENCY NAME). No one likes to think about getting into an accident, but being prepared can make the post-accident insurance process a lot easier. Download our step-by-step guide and store it in your glove compartment so you have all of the information you need in case an event does occur. (INSERT LINK).

## Phase 7: Buying Boat, RV, Additional Vehicles

### EMAIL

Hi (INSERT FIRST NAME),

I hope this email finds you well. If you are thinking about purchasing a boat, RV or additional vehicles, there may be discounts that will save you money on your insurance.

Let us know right away what additions you are making, and we can work on quotes.

Please feel free to call me at (INSERT PHONE NUMBER) to discuss any new additions. Also check out our fact sheets on RV and boat insurance which might answer some of your initial questions (INSERT LINK).

Best,

### TEXT MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME) from (INSERT AGENCY NAME). If you are thinking about purchasing a boat, RV or additional vehicles there might be savings opportunities with insurance.

Contact us today and we can start working on quotes to make sure you are getting the best coverage.

## 8. Survey or Client Rating

### EMAIL:

Hi (INSERT FIRST NAME),

We value your business and really enjoy working with you – and we wanted to check in and make sure you are receiving the service and support that you need. Please take a moment to review us on (INSERT REVIEW PLATFORM LINK).

The process is very simple and should only take a few minutes. If there is anything about our service that you would like to discuss directly with us, please do not hesitate to email or call me at (INSERT PHONE

NUMBER). We appreciate your feedback that enables us to make sure we are providing the best experience for our customers.

Best,

### TEXT MESSAGE:

Hi (INSERT FIRST NAME). This is (INSERT NAME) from (INSERT AGENCY NAME). Your feedback is vital to making sure we are providing the best service possible to our clients. Can you please take a moment to review us on (INSERT LINK TO REVIEW PLATFORM) and share your opinion. The process takes only a few minutes. Thank you!

## 9. Changes to Drivers

### EMAIL

Hi (INSERT FIRST NAME),

We are just checking in – and to make sure there haven’t been any lifestyle changes that might impact your auto coverage. Life changes like marriage, or a child beginning to drive or a child going away to college might require new drivers to be added to your policy or have some individuals removed.

If there have been changes to drivers, please let us know right away and we can help you adjust your coverage and find any savings. Email us or call us at (INSERT PHONE NUMBER).

Best,

### LETTER:

Hi (INSERT FIRST NAME),

We are just checking in and making sure there haven’t been any lifestyle changes that might impact your auto coverage. Life changes like marriage, or a child beginning to drive or a child going away to college might require new drivers to be added to your policy or have some individuals removed.

If there have been changes to drivers, please let us know right away and we can help you adjust your coverage and find any savings. Please email us at (INSERT EMAIL ADDRESS) or call us at (INSERT PHONE NUMBER).

Best,

### TEXT MESSAGE

Hi (INSERT FIRST NAME)*.* This is (INSERT NAME) from (INSERT AGENCY NAME). I’m checking in to make sure there haven’t been changes – such as marriage, a new roommate, a child going away to college – that might require people to be added or removed from your auto policy. If there has been changes please contact us and we can work with you to update your policy.

### VOICE MAIL MESSAGE

Hi (INSERT FIRST NAME). This is (INSERT NAME) from (INSERT AGENCY NAME). I am checking in to make sure the information we have for your auto policy is still up to date and that there haven’t been any lifestyle changes such as marriage or a child going away to college that might require you to add or remove drivers from your policy. If there have been changes, please contact me at (INSERT PHONE NUMBER) and I will update your policy.