

Call Script for the Insurance Vertical

Use this call script for outreach to insurance prospects.

Hi [NAME], this is [YOUR NAME] from [YOUR COMPANY]. The reason for my call is that many insurance agents/brokers don't have phone systems that cater to their needs at a good price. Vendors offer a lot of features, but they don't build a relationship and offer the local support you're looking for.

What if you could modernize your phone system to get the mobility, video and texting, remote capabilities, and other key features you need along with personalized, white-glove support—and doing it all cost-effectively?

If open to discussion (general questions to ask)

We work with a lot of insurance businesses, like [NAME RELEVANT CUSTOMERS IN THIS VERTICAL] to provide them with a solution that includes all the capabilities they need at a great price. And we're also part of [LOCALITY] and care about the success of our community.

Our insurance companies tell us that rock-solid call quality and local service are key. If you don't mind me asking, what capabilities or service levels are critical for your business that are missing from your existing setup or are too expensive or not meeting your expectations?

[Move to close]

If not open to discussion

When would be a better time to call back? Or is there someone else at [INSURANCE COMPANY] I should contact?