



Greeting: Hello, and thank you for calling. My name is [OpName] with [CampaignName]. What kind of insurance can I help you with today?

i. Auto Insurance

- a. Great! To give you an accurate quote with the biggest discounts, I have to ask you few quick questions. May I have your first and last name?
- b. And what is the best number to reach you?
- c. Thank you [FirstName]. May I have your date of birth please?
- d. What is the best email address for you?
- e. Alright, may I have your address please?
- f. Is this the address on your driver's license?
- g. Okay, [FirstName], what is the year, brand and model of the vehicles you want to quote?
- h. Do you need full coverage or only liability coverage?
- i. Have you had active car insurance for the past 6 months?
- j. Great, thank you for speaking to us. We will have one of our agents reach out to you to finalize your quote. Have great day!
 - i. Send message through.

ii. Health Insurance

- a. I can certainly help you with that quote, I just have a few quick questions. May I have your first and last name please?
- b. And what is the best number to reach you?
- c. Thank you [FirstName]. May I have your date of birth please?
- d. What is the best email address for you?
- e. Alright, may I have your address please?
- f. Alright, what is your expected yearly income for 2019?
- g. When you file taxes do you file jointly with a spouse?
- h. When you file taxes do you file any children as dependents or any other dependents?
- i. Are there any specific doctors or hospitals that you normally go to?
- j. Okay [FirstName], we will have one of our agents reach out to you to finalize your quote very soon. Thank you for calling and have a nice day!
 - i. Send message through.

iii. Home Owners Insurance

- a. I can certainly help you with that quote, I just have a few quick questions. May I have your first and last name please?
- b. And what is the best number to reach you?
- c. Thank you [FirstName]. May I have your date of birth please?
- d. What is the best email address for you?
- e. Alright, may I have your address please?
- f. Is this the address you are seeking to get coverage on?
- g. Do you own your home, rent or stay with family?
- h. Great, thank you for speaking to us. We will have one of our agents reach out to you to finalize your quote. Have great day!
 - i. Send message through.