

Sample Call Center Script: Appointment Setting for an Insurance Company

Emily

Birde Insurance, how can I help you?

Kevin

Yeah, hi. I was calling to see if I could compare different business insurance policies and my workman's comp insurance, as well.

Emily

Sure. You know, what I can do for you is actually set up a meeting with one of our representatives. Would you be interested in doing that?

Kevin

Oh absolutely.

Emily

Alright, sir. Let me just get some information from you. Could you spell your first and last name for me?

Kevin

Sure it's Kevin, K-E-V-I-N. And my last name is Koz, K-O-Z.

Emily

Okay I have Kevin, K-E-V-I-N, Koz, K-O-Z.

Kevin

Correct.

Emily

Okay, Mr. Koz. And what is a good number to reach you at?

Kevin

I'm going to give you my cell phone number. It's probably best to reach me that way. I can be reached at, area code 610, 265-1714.

Emily

Okay. I have your cell phone at 610-265-1714.

Kevin

Yes, that's correct.

Emily

And can I also have your company name?

Kevin

Sure. I'm with Metropolitan Designs.

Emily

Okay. I have Metropolitan Designs. I'm just going to spell that back to you. It's M-E-T-R-O-P-O-L-I-T-A-N. Designs: D-E-S-I-G-N-S.

Kevin

Correct.

Emily

Alright, wonderful. When is a good time for you to meet with one of our representatives?

Kevin

Are there any openings tomorrow?

Emily

Sure. Actually, our representative, Howard Gibbs, is available at 11a.m., 12:30, and 3.

Kevin

You know what, 12:30 would be good.

Emily

Okay, Mr. Koz. I have you meeting with Howard Gibbs tomorrow, August 6th, at 12:30p.m. Is there anything else I can help you with today?

Kevin

No that's all I need. Thank you so much.

Emily

Sure, thank you. Have a great day.

Kevin

You, too. Bye.

Emily

Bye.

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