



Auto Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi, my name is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because auto insurance rates have recently dropped by up to 35%. If I could help you find a plan that offers better coverage at a lower rate than what you're currently paying, would you be open to considering that?

[Wait for a "Yes" response.]

Great! I just need to ask you a few quick questions to ensure we find the best possible plan for you.

Qualification Questions (For All Scenarios)

1. **Full Name:**
Could you please confirm your first and last name?
2. **Address:**
Can I confirm your address (city, state, and zip code) to ensure we find plans available in your area?
3. **Are you a homeowner?**
 - If YES: You may qualify for additional discounts.
 - If NO: Proceed to the next question.
4. **Vehicle Information:**
 - Could you confirm the make, model, and year of the vehicle you're driving?
5. **Current Insurance Provider:**
 - Who has been your insurance provider over the last 12 months?

6. Email Address:

- May I have your email address for future correspondence and quotes?

7. Date of Birth:

- May I confirm your date of birth for the insurance application? (If they're uncomfortable, ask for their age.)

8. Driving History:

- Have you had any DUIs, accidents, or tickets in the last year?
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1. Callback Lead Handling (Auto Insurance)

Step 1: Confirm Interest

- Would you like to schedule a callback to go over your auto insurance options in more detail?

Step 2: Schedule a Callback

- When would be the best time for our licensed agent to call you back? We can schedule it for:
 - Morning
 - Afternoon
 - Evening

Step 3: Verify Details

- Let me confirm your details for the callback:
 - Full Name
 - Address
 - Vehicle Information
 - Current Insurance Provider
 - Email Address
 - Date of Birth
 - Driving History

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] at [Scheduled Time]. When they call, they may ask for your favorite color as a security check. Thank you for your time!

2. In-Person Appointment Handling (Auto Insurance)

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our licensed agents to review the auto insurance options and help you find the best deal. Would you be open to meeting with us?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
 - Option 1: [Date/Time]
 - Option 2: [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the appointment:
 - Full Name
 - Address
 - Vehicle Information
 - Current Insurance Provider
 - Email Address
 - Date of Birth
 - Driving History

Step 4: Confirm the Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please remember that the agent will ask for your favorite color as a security check.

3. Live Transfer Handling (Auto Insurance)

Step 1: Live Transfer Introduction

- I can transfer you to one of our licensed agents right now, who can help you review your auto insurance options and find the best coverage. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
 - Full Name

- Address
- Vehicle Information
- Current Insurance Provider
- Email Address
- Date of Birth
- Driving History

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will review your auto insurance options and answer any questions you have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested:**
"I understand, but rates have dropped significantly, and we could potentially save you a lot on your premiums. Would you be open to exploring more options at a later time?"
- **Already Have Auto Insurance:**
"That's great! Many of our clients already had coverage, but we helped them find better deals or added benefits. Would you be open to comparing your current plan with the options we can offer?"
- **Can't Afford Auto Insurance:**
"I understand, but we have plans that can offer lower premiums while maintaining great coverage. Could we schedule a quick call to explore these options?"
- **How Did You Get My Information?:**
"We usually receive information through online requests or databases that help individuals find affordable auto insurance options."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Address
3. Vehicle Information
4. Current Insurance Provider
5. Email Address

6. Date of Birth
 7. Driving History
 8. Next Steps (Callback, In-Person Appointment, or Live Transfer)
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Closing Statement

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best auto insurance plan at the lowest rate. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!

Premium Lead Solutions