



BROUGHT TO YOU BY  **agencybloc**



## We want to make your life easier.

So, we typed up these email templates for you to use when you're setting up those ongoing email campaigns or for when you're simply reaching out to a current prospect or client.

We've developed templates for these specific situations, but they are yours to dice these up and customize to fit your needs.

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## To Ask for a Referral/Lead

**Subject line: Thank you for your business**

Hi [CLIENT NAME],

I wanted to reach out to thank you for your business. We truly appreciate clients like you and wanted to extend our help to any of your friends or family. I would be happy to answer any insurance questions they might have and would take extra care.

Thank you,  
[YOUR NAME]

### Why it works:

It's not pushy. It's setting up the referral mindset & showing that you honestly care about your client's friends or family. It shows that relationships are important to you.



## After Receiving a Prospect (First Contact)

**Subject line:** [CLIENT NAME] referred you

Hi [PROSPECT'S NAME],

I'm reaching out because [client name] mentioned that you are considering [product/service]. I would be happy to help answer any questions or concerns you have regarding this, and I have attached some information that I hope will be helpful.

I will try to reach you on the phone on [date/time], but you can always reach me at [phone number].

Thank you,  
[YOUR NAME]

### Why it works:

Again—not pushy. This message is short & concise, offering the necessary information upfront for the referred person to consider his/her options. It also shows the referred person that referrals are an important part of your business.



## To Thank a Client for a Referral/Prospect

**Subject line: Thank you for referring [REFERRED NAME]**

Hi [CLIENT NAME],

I'm reaching out to thank you for referring [prospects's name]. I'm glad you consider my services valuable and that you've passed along my information. I'm looking forward to helping your [friend/family] find something that works for them.

Thank you,  
[YOUR NAME]

### Why it works:

It shows that you notice & appreciate referrals. \*NOTE: you should send handwritten notes & a small gift (gift card) to show thanks as well. It is best to give gifts when they are unexpected.



## After the Initial Meeting

**Subject line: Thanks for meeting with me**

Hi [REFERRED/PROSPECT NAME],

Thank you for meeting with me [date/day/time].

I'm glad we talked about [specific situation], and I hope I was able to answer your questions adequately. I have attached the information we discussed as well as a couple other options I think you should take a look at.

I will try to reach you [date/time] to see if you have any more questions.

You can reach me in the meantime at [phone number].

Thank you,  
[YOUR NAME]

### Why it works:

It sets up a specific plan of action after your initial meeting to keep the ball rolling. \*NOTE: this is a simple example, and these emails should definitely be personalized for each individual person.



## After Leaving a Voicemail

**Subject line:** Sorry I missed you...

Hi [FIRST NAME],

Sorry I missed you. I was calling to chat with you about [your policy renewal, new carrier information, a product or service you previously asked about, etc.].

Attached is the [document/information] I briefly told you about in my voicemail. I will try you again on [date/time] to discuss this in further detail and answer any questions you have.

You can reach me in the meantime at [phone number].

Thank you,  
[YOUR NAME]

### Why it works:

It keeps the task at hand at the top of the client or prospect's mind without being pushy. It sets up a timeline to continue the conversation so the client or prospect knows what to expect.



## Renewal Reminder

**Subject line: Renewal Reminder: [policy]**

Hi [CLIENT NAME],

I wanted to remind you that your [life/health policy] expires on [date].

Attached is the policy [document/information]. Please let me know if you'd like to renew this under the same terms.

I will try you on the phone on [date/time], but you can reach me in the meantime at [phone number].

Thank you,  
[YOUR NAME]

### Why it works:

It sets up a time for you to discuss their policy renewal, or it pushes them to action if that time doesn't work for them. \*NOTE: this would be a great email to automate based on the renewal date

## Prospecting/Marketing Message

**Subject line: You might be interested in [life insurance]**

Hi [PROSPECT NAME],

[Life insurance] is incredibly important for [people with families], and we take pride in [protecting your loved ones]. I'm writing to tell you about [life insurance product] that we offer and that I believe might interest you.

Attached is the [document/information]. Please let me know if you have any questions or would just like to chat about your options.

I will try you on the phone on [date/time], but you can reach me in the meantime at [phone number].

Thank you,  
[YOUR NAME]

### Why it works:

Without being pushy, it quickly informs the prospect about the product and then sets up a plan of action. Attaching the information about the product instead of typing it all out in the email increases the chances that the prospect will actually read the email.

**\*NOTE: this would be a great email to automate based on the renewal date**