**Insurance Sales Consultant Nurture Email Templates**

**How to Use This Document**

1. Ctrl-Click the topic name in the left column of the summary table below to jump to the desired email within this document.
2. Ctrl-Click “Back to Top” below any email template to return to this page.
3. If it’s been a while since you downloaded this, check for the latest email templates on the Insurance Collateral site at [www.fonality.com/insurance-collateral](http://www.fonality.com/insurance-collateral).

|  |  |
| --- | --- |
| **Use Case** | **What This Email Does...** |
| **When working a new lead:** |
| [**First Contact Follow Up**](#FirstContact)You’ve called a new lead but were unable to reach him or her by phone | * Introduces you as a personal point of contact
* Highlights Fonality’s insurance expertise/starts building trust
* Asks for a time to talk live
 |
| **[First Call Follow Up –](#FirstCallLiveOne)** **[We’ve Got a Live One!](#FirstCallLiveOne)**You’ve completed your first call and are expecting a quick, positive next step (i.e. demo, proposal). | * Advances the relationship by delivering on promises
* Commits to timing of next steps
* Provides easy access to additional relevant info
 |
| [**First Call Follow Up – Not Interested**](#FirstCallNotInterested)You’ve completed your first call. And the lead is not interested. At all. (Wah, wah…). | * Closes the loop on a positive note and offers future help for folks with no future intent to purchase
 |
| [**First Call Follow Up – Maybe Later/Just Researching**](#FirstCallLater)You’ve completed your first call. Like your high school sweetheart, this lead just isn’t willing to commit. | * Follows up with a helpful link
* Reinforces positioning as an expert resource for those just getting up to speed
* Sets expectations for when you’ll follow up, if appropriate
 |
| [**First Call Final Follow Up – Haven’t Heard from You (Ta-ta for now!)**](#FinalFollowUp)You’ve called and emailed but haven’t gotten a response. | * Puts the ball in their court
* Ensures they know you’re here to help when the time is right
 |
| **Lead requested more information: [PENDING]** |
| Fill in the Blank(s)Your contact wants more information such as references/testimonials or our product before taking the next step. | * Answers questions in a timely fashion
* Reinforces your role as an expert resource
 |
| **During the proposal process:** |
| [**Proposal – More Information**](#ProposalMoreInfo) You need a few key facts to complete the proposal | * Asks for the needed information
 |
| [**Proposal – Sending/Sent**](#ProposalSent)You’ve just sent (or are about to send) the proposal | * Alerts your contact to watch for the separate proposal email
* Gently asks for the sale
* Schedules follow up
 |
| [**Proposal – Haven’t Heard**](#ProposalHaventHeard)You’ve followed up on the proposal you sent weeks ago and are getting crickets. | * Puts the ball in their court
* Ensures they know you’re here to help when the time is right
 |
| [**Proposal – Not Ready**](#ProposalNotReady)Your prospect tells you they aren’t ready to move forward. | * Confirms your conversation
* Establish the next time they’ll hear from you, if appropriate
 |
| **Win or lose: [PENDING]** |
| [**Welcome to Fonality**](#Welcome)Great job! You’ve won the business. Now what? | * Outlines next steps after the deal is signed
* Hands off from sales to getting started
 |

**New Lead**

**First Contact Follow Up**

*Paste the following into the Subject line of your email*:

Meet Your Fonality Consultant

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Thank you for your interest in Fonality. As a follow up to my voicemail, I wanted to introduce myself as your resource for discovering how our business phone systems can help you sell and service policies.

I look forward to learning more about how we can meet your agency’s needs. We’re already helping almost 2,000 agencies like yours work better internally and deliver exceptional customer service. Our solution increases productivity, too, with time savings of up to two hours per person per day!

Do you have time in the next week to hop on the phone? I have a few quick questions for you, and I’d be happy to answer any questions you may have as well.

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**First Call Follow Up – We’ve Got a Live One!**

*Paste the following into the Subject line of your email, replacing the highlighted text as noted*:

Thank You! Next Step: [1-3 word summary of next step, i.e “Demo Tuesday 10 am?” or “Sending Proposal”]

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Thank you for your time today. I really enjoyed talking with you about how new Fonality business phone system can improve teamwork, sales and service for your agency.

We talked about [scheduling a demo/sending a proposal/your sending agency details/more info]. [Add sentence or two based on the follow up, such as:

Are you available Tuesday at 10 am?

Watch for a proposal by end of day tomorrow. That email will come directly from our system.

Attached please find the ebook we discussed.

Get step-by-step help from our Phone System Buying Guide: <http://www.fonality.com/resources/buying-guide>.

I also thought you might like a bit more background on our insurance know-how. While we’re pretty sure more insurance agents use Fonality than any other phone system, isn’t it better to get the scoop straight from some of the folks who actually use it? Check out our True Stories at [www.fonality.com/insurance](http://www.fonality.com/insurance).

I’ll plan to check in again on [DAY]. In the meantime, let me know if I can be of further assistance.

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**First Call Follow Up – Not Interested**

*Paste the following into the Subject line of your email*:

Until We Meet Again

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Thank you for your time today. I really enjoyed talking with you about Fonality. While I understand you are not considering a new business phone system at this time, please feel free to reach out if I can be assistance in the future.

When the time does come to upgrade to a fancy-yet-affordable phone system, get help through the process in our free buying guide: <http://www.fonality.com/resources/buying-guide>.

Of course, I’ll be here if you need me.

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**First Call Follow Up – Maybe Later/Just Researching**

*Paste the following into the Subject line of your email*:

Until We Meet Again

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Thank you for your time today. I really enjoyed talking with you about Fonality. I understand you are not shopping for a new business phone system at this time, but I hope our discussion was helpful as you gather more information.

When the time does come to upgrade to a fancy-yet-affordable phone system, get help through the process in our free buying guide: <http://www.fonality.com/resources/buying-guide>.

As discussed, I’ll touch base with you in [number of weeks/months]. Feel free to give me a shout if I can answer any questions before then.

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**First Call Final Follow Up – Haven’t Heard from You (Ta-ta for now!)**

*Paste the following into the Subject line of your email*:

Ready When You Are

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

I’ve tried to reach you in response to your recent Fonality inquiry about business phone systems. Sadly, I’ve struck out. I may have the worst timing ever, or maybe you won the lottery.

Either way, I don’t want to be one of those sales stalker-types you tell stories about to your colleagues and friends (Oh, you know the ones). This will be the last time you hear from me – unless I hear from you.

When the time does come to upgrade to a fancy-yet-affordable phone system, I’m ready when you are. Please drop me a line!

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**Proposal**

**Proposal – More Information**

*Paste the following into the Subject line of your email*:

Items Needed to Finalize Your Fonality Proposal

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

I just need a few more details to finalize your proposal for a new Fonality business phone system.

Could you please send the following information when you have a few minutes?

* [List details you need to complete the proposal]

This information will let me customize your proposal and provide accurate pricing for your agency.

Thank you for considering Fonality!

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**Proposal – Sending/Sent**

*Paste the following into the Subject line of your email*:

Watch for Your Fonality Proposal

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Good news! I’ve completed your custom quote. Just wanted to give you a heads up to watch for an email directly from our proposal system. If you don’t see it [now/shortly/by end of day], you may want to check your junk mail folder.

The system will walk you through signing the agreement electronically if everything looks good and you are ready to move forward.

I’d be happy to talk you through it and answer any questions, tho. Please feel free to give me a shout any time! Otherwise, I’ll follow up with you by [end of week/day].

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**Proposal – Haven’t Heard Back**

*Paste the following into the Subject line of your email*:

Checking In: Your Fonality Proposal

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

I’m writing to follow up on the proposal for a new Fonality phone system you should have received on [DATE]. I haven’t heard from you in a while.

Lassie hasn’t alerted me you’ve fallen down a well, so I’m betting you just got busy selling and servicing policies. I’m confident we can help your team work together more effectively and deliver stellar customer service. If the time is still right to upgrade your phone system, it’s really quick and easy to move forward.

Please let me know if there are any questions I can answer!

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**Proposal – Not Ready**

*Paste the following into the Subject line of your email*:

Closing the Loop

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Thanks for letting me know you’ve put your business phone system search on hold for now. When the time comes to move forward, I’m available to help you through the process.

Closing 1 (pick one, remove this red text): I’ll touch base with you in [number of weeks/months] as discussed. Feel free to give me a shout if I can answer any questions before then.

Closing 2 (pick one, remove this red text): I’ll leave the ball in your court as discussed. If I haven’t heard from you in [three/six] months, would it be okay if I checked in?

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**Proposal – Last Follow Up**

*Paste the following into the Subject line of your email*:

Fonality Proposal Final Touch Base

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

I’m writing to follow up one last time on Fonality phone system proposal I submitted on [DATE]. This will be the last time I check in until I hear from you that you are ready to talk. I don’t want to be THAT sales person.

When the time does come to upgrade to a phone system proven to deliver improved collaboration, sales and customer service for insurance agencies like yours, I’m just a call or email away.

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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**Win/Lose**

**Welcome to Fonality**

*Paste the following into the Subject line of your email*:

Welcome to Fonality!

*Replace the highlighted text below to customize your note, and then paste into the body of your email*:

Hi, [NLFIRST NAME].

Thank you so much for choosing Fonality. Here’s what happens next:

1. ???

If you have any questions as you are getting started…

Sincerely,

[YOUR NAME], Insurance Sales Consultant

[YOUR DIRECT LINE]

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