

# **PL Pipelines**

(Personal Lines New Business)

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# PL Pipelines

**New Leads:** Leads from online submissions and some agent created leads start here. Typically, we just have some basic information, and the pipeline is designed to collect more info.

**Send Fast App-** Once you put the client into this stage you have talked with the client over the phone but are needing more information for them to fill out.

**Send Canopy Connect-** An action taken to facilitate communication or gather additional information from the client. It involve sending a set of instructions to the client to move them further along in the process.

**Missing Info-** After the initial conversation, we figured out we are needing more info.

**Hold/VA-** This is designed for when we are ready to have our Quoting Assistant Quote.

**Agent Review-** Quote is ready for producer to review.

**Quote Ready-** When you are ready to send out a quote but want to discuss it with the client first. Don't send the quote out before you put them into this stage.

**Quote Sent -** After you send a quote to a prospect, put the lead into this stage and it triggers follow ups.

**Hold/Pending Bind -** Use this stage after you received communications that the client wants to bind the policy.

**Quoted- Waiting on Decision -** Use this stage on the day you have scheduled a time to set up a clients policy.

**Send Apps -** Use this stage when you are ready for apps to be sent.

## New Leads

Pipeline Description: Leads from online submissions and some agent created leads start here. Typically, we just have some basic information and the pipeline is designed to collect more info.

### Day 1

#### **Email to Producer to Client (sent Immediately).**

Hello [[First Name]]!

I wanted to say thanks for reaching out for information about your insurance. I am excited to get started and review your current insurance needs and see how we can best serve you.

Here at [[My Agency Name]], we represent a wide variety of A-rated insurance companies giving us the ability to find the best product at the best value for you.

Please reply to this email or if you prefer to get started now, fill out this Fast App here so that we can begin going to work for you.

Respectfully,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

Hi {First Name} , this is {Agent First Name} from {My Agency Name} . To get started, please fill out our Fast App below. I look forward to making this experience as easy as possible for you.

<https://www.millenniumbrokers.com/plapp/>

## New Leads (cont'd)

### Day 3

#### **Email to Producer to Client (sent Immediately).**

Hello [[First Name]]!

At [[My Agency Name]], our number 1 priority is making sure you get the most coverage for the best rate. This year, we've helped hundreds of clients with their insurance needs and we're delighted to do the same for you.

Fill out this [Fast App](#) to get started now. If you have questions, don't hesitate to reach out.

Thanks,

[[Agent Email Signature]]

### Day 5

#### **Text to Client (sent Immediately).**

Fast App Bitly Here

<https://www.millenniumbrokers.com/plapp>

I am following up on your recent online inquiry and wanted to let you know that not only do I shop for you from a variety of A-rated insurance companies, but I also do so at every renewal to ensure you're always getting the best possible value. Is now a good time to talk? If not, click on the Fast App above to get started.

## New Leads (cont'd)

### Day 6

#### **Email to Producer to Client (sent Immediately).**

Hello [[First Name]],

Just following up, I reached out a few days ago and wasn't able to get a hold of you.

I see that you requested some information online for your insurance needs.

We are looking forward to working on your quotes ASAP. We need some more information before we can gather your quotes.

I'm committed to making sure you have the best insurance at the best price. Let me know how you would like to proceed.

If you want to get started now, fill out this [Fast App](#) or reply to this email.

[[Agent Email Signature]]

### Day 8

#### **Text to Client (sent Immediately).**

Fast App Bitly Here

<https://www.millenniumbrokers.com/plapp>

Listen, I understand you have A LOT going on. I'm here to make the insurance part simple for you.

Reply or fill out our Fast App above and let me go to work for you.

## New Leads (cont'd)

### Day 10

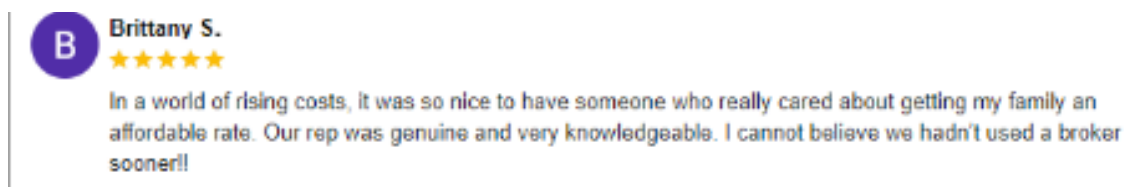
#### Email to Producer to Client (sent Immediately).

{First Name} , See Why We are Right for You!

Hi [[First Name]],

Just following up on my previous emails.

I wanted to share a recent review of what one of our other clients thought of our agency.



We look forward to beating your expectations of what an insurance experience can be!

This is an open door, so please feel free to ask any questions before we get started!

To get started, fill out this Fast App and we will get to it right away!

Looking forward to helping you find a great insurance policy!

[[Agent Email Signature]]

## New Leads (cont'd)

### Day 16

#### **Email to Producer to Client (sent Immediately).**

Can't seem to reach you, {First Name}

Hi [[First Name]],

This will be the last time I reach out to see if I can help save you money on your insurance needs.

My system will close your file if I do not hear from you by the end of the day. Give me a callback or respond to this email. If you want to get started now, please fill up this Fast App.

All the best,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

I wanted to reach out one last time to see how much money I can save you on your insurance.

My system will close your file if I do not hear back from you by the end of the day.

I'm here to help should anything change.

## Send Fast App

Pipeline Description: Once you put the client into this stage you have talked with the client over the phone but are needing more information for them to fill out.

### Day 1

#### **Email to Producer to Client (sent Immediately).**

Join {My Agency Name} - Fast App Below

Fast App <<< Get Started Now

Hi [[First Name]],

Great connecting with you today! To help me better understand your situation, please click on the Fast App above and I'll gladly start my research, thank you!

Credibility Matters

Feel free to call/text if you have any questions: [[Agent Phone Number]]

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

Hi {First Name} - It was great connecting. Here is our Fast App, looking forward to your submission - {Agent First Name} , {My Agency Name}

<https://www.millenniumbrokers.com/plapp>

## Send Fast App (cont'd)

### Day 4

#### **Email to Producer to Client (sent Immediately).**

{My Agency Name} - Trusted Resource

Hello [[First Name]],

I hope you're well, checking in to see if you have any additional questions.

All I would need is the form completed and we can start the process of quoting your insurance.

Fast App

Just a friendly reminder, we have a wide variety of A-rated insurance companies that we work with and can always find the best solution for your family.

Feel free to give us a call: [[Agent Phone Number]]

Sincerely,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

Checking in to see if you had any questions about the Fast App?

<https://www.millenniumbrokers.com/plapp>

## Send Fast App (cont'd)

### Day 8

#### **Email to Producer to Client (sent Immediately).**

Reminder, Action Needed

Fast App << Get Started Now

Hi [[First Name]],

I hope you're having a great day.

Do you need help with the Fast App?

If you prefer a phone call you can reach me directly at [[Agent Phone Number]].

I look forward to hearing from you!

[[Agent Email Signature]]

### Day 12

#### **Text to Client (sent Immediately)**

Is there a good time to talk today?

## Send Fast App (cont'd)

### Day 16

#### **Email to Producer to Client (sent Immediately).**

Closing your file

Hello [[First Name]],

Not sure if you already secured insurance elsewhere or if you no longer need it?

If you still need insurance, here is my Fast App. Otherwise, I'll reach out at your next renewal.

Feel free to give me a call: [[Agent Phone Number]]

Sincerely,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

I was hoping to hear from you by now and don't want to be a pest. Let me know if you want to proceed, otherwise, I'll close your file for now.

## Send Canopy Connect

Pipeline Description: An action taken to facilitate communication or gather additional information from the client. It involve sending a set of instructions to the client to move them further along in the process.

### Day 1

#### **Email to Producer to Client (sent Immediately)**

Join {My Agency Name}

Hi [[First Name]],

Great connecting with you today! We love to use technology to better serve you. You can click the link below to upload copies of your policy by logging into your current company. All you have to do is login and it automatically sends it to us.

Canopy Connect - [Upload your Declarations Page here](#)

Feel free to call/text if you have any questions: [[Agent Phone Number]]

[[Agent Email Signature]]

#### **Text to Client (sent Immediately)**

Hi {First Name} - It was great connecting with you. You can upload a copy of your Dec. Page below and I'll start my research once I get it - {Agent First Name} , {My Agency Name}

Canopy Connect Link here

## Send Canopy Connect (cont'd)

### Day 4

#### **Email to Producer to Client (sent Immediately).**

{My Agency Name} - Trusted Resource

Hello [[First Name]],

I hope you're well, checking in to see if you have any additional questions.

All I would need is a copy of your Dec. Page and we can start the process of quoting your insurance.

Canopy Connect

Just a friendly reminder, we have a wide variety of A-rated insurance companies that we work with and can always find the best solution for your family.

Feel free to give us a call: [[Agent Phone Number]]

Sincerely,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

Checking in to see if you had any questions for us.

## Send Canopy Connect (cont'd)

### Day 8

#### **Email to Producer to Client (sent Immediately).**

Reminder; Action Needed

Canopy Connect - Upload your Declarations Page here.

Hi [[First Name]],

I hope you're having a great day.

Do you need help with your Dec. Page upload?

If you prefer a phone call you can reach me directly at [[Agent Phone Number]].

I look forward to hearing from you!

[[Agent Email Signature]]

### Day 12

#### **Text to Client (sent Immediately).**

Is there a good time to talk today?

## Send Canopy Connect (cont'd)

### Day 16

#### **Email to Producer to Client (sent Immediately).**

Closing your file

Hello [[First Name]],

Not sure if you already secured insurance elsewhere or if you no longer need it?

If you still need insurance, upload your Dec. Pages below and I'll work on it immediately. Otherwise, I'll reach out at your next renewal.  
Canopy Connect

Feel free to give me a call: [[Agent Phone Number]]

Sincerely,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

I don't want to be a pest, but I was hoping to hear from you by now. Let me know if you want to proceed, otherwise, I'll close your file for now.

## Missing Info

Pipeline Description: After the initial conversation, we figured out we are needing more info.

### Day 2

#### **Email to Producer to Client (sent Immediately)**

Would you like to reschedule for a specific time?

Hello [[First Name]],

Sorry that we were not able to connect yesterday.

Are you able to email the missing information or is there a specific time that would be good for me to call?

Thank you and I hope to hear from you soon,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately)**

Hi {First Name} , this is {Agent First Name} from {My Agency Name} . Looking forward to speaking to you today to get the outstanding info to prepare your policy!

### Day 4

#### **Text to Client (sent Immediately)**

Looks like we need a little more information from you to complete your new policy. Please give me a call or text as soon as you can.

## Missing Info (cont'd)

### Day 6

#### **Email to Producer to Client (sent Immediately).**

When should we talk?

Hi [[First Name]],

Hope all is well.

I want to make sure we get this great coverage and rate locked in.

Is there a good time to talk?

Talk soon,

[[Agent Email Signature]]

### Day 7

#### **Text to Client (sent Immediately).**

Touching base, are you able to get me the information so that I can finalize your policy? Thanks

### Day 10

#### **Text to Client (sent Immediately).**

Hi {First Name} , {Agent First Name} with {My Agency Name} . Please let me know if you are still interested in getting your new insurance started.

## Missing Info (cont'd)

### Day 11

#### **Email to Producer to Client (sent Immediately).**

Information Still Needed

Hi [[First Name]],

Hope all is going well.

Looks like we are missing a piece of information to complete your policy.

Please let me know what works best for your schedule to chat real quick.

Thanks,

[[Agent Email Signature]]

### Day 20

#### **Email to Producer to Client (sent Immediately).**

Quote Expiring

Hi [[First Name]],

This is the last time I will be reaching out.

If I don't hear from you by the end of the day, my system will close your file.

However, if you're ready to proceed at a later date please contact me at [[Agent Phone Number]] and we'll get started again immediately.

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

I don't want to be a pest, so this is the last time I will reach out to avoid cluttering your phone. If I don't hear back from you, I'll follow up prior to your next renewal.

## **Hold/VA**

Pipeline Description: This is designed for when we are ready to have our Quoting Assistant Quote.

- NO AUTOMATED EMAIL OR TEXT -

## Agent Review

Pipeline Description: Quote is ready for producer to review.

### Day 1

#### **Email to Producer to Client (sent Immediately).**

Quote for

Your Quote for [[First Name]] [[Last Name]] is ready.

## Quote Ready

Pipeline Description: When you are ready to send out a quote but want to discuss it with the client first. Don't send the quote out before you put them into this stage.

### Day 1

#### **Text to Client (sent Immediately).**

Hey {First Name} , we're in the final stages of preparing the quotes that you requested. I'll be reaching out soon to review your options. I think you're going to be really happy. Looking forward to talking with you soon.

### Day 2

#### **Text to Client (sent Immediately).**

Hi {First Name} , your proposal is now ready! When is a good time to connect with you?

### Day 3

#### **Email to Producer to Client (sent Immediately).**

{My Agency Name} ; Trying to contact you

Hey [[First Name]],

I'm reaching out regarding your Insurance Proposal to let you know that we have it ready. It's looking great, and I just need your thumbs up on it to get started and take this off of your plate.

Feel free to reply to this email or just call me directly at [[Agent Phone Number]].

[[Agent Email Signature]]

## Quote Ready (cont'd)

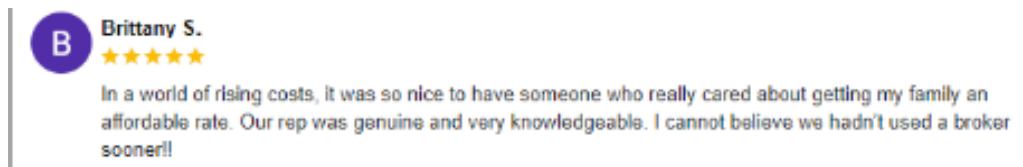
### Day 6

#### **Email to Producer to Client (sent Immediately)**

See why {My Agency Name} is the #1 rated insurance agency

Hey [[First Name]],

Your proposal is ready but I haven't heard back from you. I wanted to show you one of my reviews and am hoping to impress upon you how much our clients love being part of the [[My Agency Name]] family. I can't wait for you to join our community.



I'm confident you're going to like what I've put together for you. Please give me a call at [[Agent Phone Number]] or just reply to this email with a good time to contact you.

[[Agent Email Signature]]

### Day 9

#### **Email to Producer to Client (sent Immediately)**

Your quote is ready - Approval Needed

Hi [[First Name]],

I have put together some different options for your insurance proposal that I am certain you will really like. I was hoping to hear back from you by now. If you went in another direction can you let me know?

[[Agent Email Signature]]

## Quote Ready (cont'd)

### Day 11

#### **Text to Client (sent Immediately)**

Hey {First Name} , I hope everything is good with you. Quick reminder for you that I have your insurance proposal ready, and I believe you'll like it. Are you available for a quick call today?

### Day 12

#### **Email to Producer to Client (sent Immediately)**

The wind must have blown you away!

Hey [[First Name]],

Life can be busy, and I am sure that you have other priorities vying for your time.

Quick question, are you still interested in the insurance proposal that we put together for you?

If so, when is a good time to connect today or tomorrow to review and proceed? If you no longer need my help, you're welcome to let me know.

If not... no harm no foul, I just want to make sure we're doing everything possible to help you.

Look forward to your response.

[[Agent Email Signature]]

## Quote Ready (cont'd)

### Day 16

#### **Email to Producer to Client (sent Immediately)**

Time-sensitive Information

Hey [[First Name]],

We're about a week out from the carrier closing your file and your rates changing. If you don't want to lose these amazing rates, I need to hear from you as soon as possible.

[[Agent Email Signature]]

### Day 19

#### **Email to Producer to Client (sent Immediately)**

Are you still interested, {First Name} ?

Hey [[First Name]],

I have yet to connect with you to complete that process to finalize your policy. I genuinely hope that you're okay. You are more than welcome to reach back out to me if you are still interested, but I am going to table this proposal now since I have not heard back from you.

I'll be here when you're ready to move forward. Until then, I'll follow up on your next renewal.

[[Agent Email Signature]]

#### **Text to Client (sent Immediately)**

Hey {First Name} , for one reason or another we've not been able to connect over the past few weeks to review your insurance proposals. I'm going to stop bugging you. I'll contact you again just before your next renewal date unless I hear from you before then. Hope all is well, looking forward to talking with you again.

## Quote Sent

Pipeline Description: After you send a quote to a prospect, put the lead into this stage and it triggers follow ups.

### Day 1

#### **Text to Client (sent Immediately)**

Hi {First Name} , this is {Agent Name} at {My Agency Name} . I just sent over your insurance quotes. Please check your email. Did you receive it?

### Day 2

#### **Text to Client (sent Immediately)**

My #1 goal was to prepare the most competitive and comprehensive solutions for you. I'm interested to know what you think about it?

### Day 3

#### **Email to Producer to Client (sent Immediately)**

Let's Get You Covered!

Hi [[First Name]],

You should have received my quote in your email inbox. If you did not, please let me know!

Thank you again,

[[Agent Email Signature]]

## Quote Sent (cont'd)

### Day 7

#### **Email to Producer to Client (sent Immediately).**

{First Name} , did you receive our proposal?

Hey [[First Name]],

You should have received your quote by now. If not it may have landed in your spam folder.

Let me know if you have any questions about the proposal.

Look forward to hearing from you!

[[Agent Email Signature]]

### Day 10

#### **Text to Client (sent Immediately).**

If you have time today to go over your proposal, please give me a call so we can talk about it!

## Quote Sent (cont'd)

### Day 11

#### **Email to Producer to Client (sent Immediately)**

Making Sure You Are Covered!

Hey [[First Name]],

I hope you are well. Reaching out because I just received an alert that we have not secured coverage for you in our system.

Checking in to see if you're still interested in proceeding, but more importantly, I wanted to make sure you don't go without coverage.

If you have gone elsewhere, please let me know.

Thanks,

[[Agent Email Signature]]

### Day 19

#### **Email to Producer to Client (sent Immediately)**

Reply Requested

Hello [[First Name]],

I just received notice that the system is closing out your file today because we have not heard from you. I can hold it open until this afternoon if you confirm.

Please let me know ASAP.

[[Agent Email Signature]]

#### **Text to Client (sent Immediately)**

Please let me know if you're still interested in your quote, otherwise it will close out today.

## **Hold/Pending Bind**

Pipeline Description: Use this stage after you received communications that the client wants to bind the policy.

- NO AUTOMATED EMAIL OR TEXT -

## Quoted- Waiting on Decision

Pipeline Description: Use this stage on the day you have scheduled a time to set up a clients policy.

### Day 1

#### **Text to Client (sent Immediately).**

Hi {First Name} , {Agent First Name} here at {My Agency Name} .

Looking forward to visiting with you today to get your insurance started!

### Day 2

#### **Email to Producer to Client (sent Immediately).**

Would you like to reschedule for some time?

Hi [[First Name]],

Sorry that we were not able to connect yesterday.

Is there a better time in the next couple of days for me to call?

Thank you and I hope to hear from you soon,

[[Agent Email Signature]]

#### **Text to Client (sent Immediately).**

Sorry, we weren't able to connect yesterday about your decision. Did you have any questions about the proposals?

## Quoted- Waiting on Decision (cont'd)

### Day 6

#### **Email to Producer to Client (sent Immediately)**

When should we talk?

Hi [[First Name]],

Have you had a chance to review the proposal? How do the coverages compare to other quotes you have received – are they apples-to-apples?

If you're not sure, you can always send us any quotes you have and we will help you review them side-by-side.

Talk Soon,

[[Agent Email Signature]]

### Day 7

#### **Text to Client (sent Immediately)**

Hi {First Name} , {Agent First Name} here at {My Agency Name} .

I wanted to get in touch before your proposal expires. Please let me know if you are still interested in starting your insurance.

## Quoted- Waiting on Decision (cont'd)

### Day 11

#### **Email to Producer to Client (sent Immediately)**

Unable to reach you, the proposal is expiring soon

Hi [[First Name]],

I hope all is well. I know you were interested in the proposal I sent, but I haven't been able to reach you.

I wanted to get in touch before your proposal expires.

Please let me know what works best for your schedule to talk.

Thanks,

[[Agent Email Signature]]

### Day 20

#### **Email to Producer to Client (sent Immediately)**

Quote Expiring

Hi [[First Name]],

This is the last time I will be reaching out.

If I do not hear from you by the end of the day, my system will close your file.

Please respond to this email or give me a call if you are still interested in the proposal.

Thank you for the opportunity. I'll reach out at your next renewal.

[[Agent Email Signature]]

## Quoted- Waiting on Decision (cont'd)

Day 20

**Text to Client (sent Immediately)**

I don't want to be a pest, so this is the last time I will reach out to avoid cluttering your phone.

My system will close your file today If I don't hear back from you. Otherwise, I'll follow up at your next renewal.

## **Send Apps**

Pipeline Description: Use this stage when you are ready for apps to be sent.

- NO AUTOMATED EMAIL OR TEXT -