



UNITED LEAD NETWORK  
EXCLUSIVE LEADS PROVIDER

# Commercial Insurance Lead Generation Sample

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## Introduction (For All Scenarios)

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

[Pause for response.]

I'm reaching out because we specialize in helping businesses like yours find the best **commercial insurance** coverage. Our policies can protect your business from risks such as property damage, liability, and employee-related incidents. I'd love to learn more about your business and help you explore insurance options that fit your needs.

Would you mind if I ask you a few quick questions to understand your business better?

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## Qualification Questions (For All Scenarios)

- 1. Full Name:**  
Could you please confirm your full name?
- 2. Business Name:**  
Can you provide the name of your business?
- 3. Industry Type:**  
What type of industry or business are you in? (e.g., retail, construction, professional services)
- 4. Number of Employees:**  
How many employees do you currently have?
- 5. Current Insurance Coverage:**  
Do you currently have any commercial insurance coverage?
  - If YES: Who is your current provider, and when is your policy up for renewal?
- 6. Primary Insurance Needs:**  
What type of commercial insurance are you most interested in? (e.g., **general liability, property insurance, workers' compensation, professional liability**)

7. **Business Location:**

Where is your business located?

8. **Timeline for Decision:**

When are you looking to secure or renew your commercial insurance coverage?

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## **1. Callback Lead Handling (Commercial Insurance):**

### **Step 1: Confirm Interest**

- Would you be interested in scheduling a callback to go over your commercial insurance needs in more detail?

### **Step 2: Schedule a Callback**

- When would be a convenient time for our advisor to call you back and discuss your business's insurance options?
  - **Morning**
  - **Afternoon**
  - **Evening**

### **Step 3: Verify Details**

- Let me confirm your details to ensure the callback is scheduled properly:
  - **Full Name:**
  - **Business Name:**
  - **Industry Type:**
  - **Number of Employees:**
  - **Current Insurance Provider** (if applicable):
  - **Primary Insurance Needs:**
  - **Business Location:**
  - **Timeline:**

### **Step 4: Close the Conversation**

- Great! You'll receive a call from our advisor [Advisor Name] at [Scheduled Time]. Please expect the call, and thank you for your time!
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## **2. In-Person Appointment Handling (Commercial Insurance):**

### **Step 1: Offer an In-Person Appointment**

- If you'd prefer, we can schedule an in-person meeting with one of our insurance specialists to go over your business's insurance needs and help you find the best coverage. 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:**
  - **Business Name:**
  - **Industry Type:**
  - **Number of Employees:**
  - **Current Insurance Provider** (if applicable):
  - **Primary Insurance Needs:**
  - **Business Location:**
  - **Timeline:**

### **Step 4: Confirm the Appointment**

- You're all set for an appointment with [Advisor Name] on [Date/Time] at [Location]. Please let us know if anything changes.

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## **3. Live Transfer Handling (Commercial Insurance):**

### **Step 1: Live Transfer Introduction**

- I can transfer you to one of our commercial insurance specialists right now, who can review your business's insurance options and help you 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:**
  - **Business Name:**
  - **Industry Type:**
  - **Number of Employees:**
  - **Current Insurance Provider** (if applicable):
  - **Primary Insurance Needs:**

- **Business Location:**
- **Timeline:**

### **Step 3: Initiate the Transfer**

- Great! I'll transfer you now to [Advisor Name], who will go over your options and answer any questions you may have.

### **Step 4: Close the Transfer**

- Thank you for your time, [Prospect Name]. You'll be speaking with [Advisor Name] shortly.
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### **Common Rebuttals (For All Scenarios)**

- **Not Interested:**

"I understand, but having the right commercial insurance coverage is crucial for protecting your business from potential risks. Would you be open to exploring some cost-effective options at a later time?"

- **Already Have Commercial Insurance:**

"That's great! Many of our clients already had commercial insurance, but we helped them find better coverage or lower premiums. Would you like to compare your current plan with what we can offer?"

- **Can't Afford Insurance Right Now:**

"I understand. We offer flexible commercial insurance plans that can fit within your budget while still providing comprehensive protection for your business. Would you be open to discussing those options?"

- **How Did You Get My Information?:**

"We usually receive information through business directories or online inquiries for commercial insurance quotes."

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### **Final Confirmation (For All Scenarios)**

Before ending the conversation, confirm the following details:

1. Full Name
  2. Business Name
  3. Industry Type
  4. Number of Employees
  5. Current Insurance Provider (if applicable)
  6. Primary Insurance Needs
  7. Business Location
  8. Timeline
  9. 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 your business find the best commercial insurance coverage at the most affordable rates. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!

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