



UNITED LEAD NETWORK
EXCLUSIVE LEADS PROVIDER

Property and Casualty (P&C) Insurance Lead Generation Sample

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 **property and casualty insurance**, helping individuals and businesses protect their homes, properties, and assets from risks like theft, fire, and liability. We offer customizable plans tailored to meet your needs.

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

Qualification Questions (For All Scenarios)

1. **Full Name:**
Could you please confirm your full name?
2. **Property Type:**
Are you looking to insure a **residential** or **commercial** property? What type of property are you looking to protect?
3. **Location of Property:**
Where is the property located?
4. **Current Insurance:**
Do you currently have property and casualty insurance?
 - If YES: Who is your current provider, and when is your policy up for renewal?
5. **Primary Coverage Needs:**
What specific coverage are you looking for? (e.g., **homeowners insurance, rental property coverage, commercial property insurance, liability protection**)
6. **Value of Property:**
What is the approximate value of the property or assets you're looking to protect?

7. **Timeline for Decision:**

Are you looking to make a decision soon, or are you exploring your options for the future?

1. Callback Lead Handling (P&C Insurance):

Step 1: Confirm Interest

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

Step 2: Schedule a Callback

- When would be a convenient time for our agent to call you back and discuss your coverage options?
 - **Morning**
 - **Afternoon**
 - **Evening**

Step 3: Verify Details

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

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] at [Scheduled Time]. Please expect the call, and thank you for your time!
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2. In-Person Appointment Handling (P&C 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 discuss your insurance needs and find the best coverage for your property. 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:**
 - **Property Type:**
 - **Location of Property:**
 - **Current Insurance Provider** (if applicable):
 - **Primary Coverage Needs:**
 - **Value of Property:**
 - **Timeline:**

Step 4: Confirm the Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please let us know if anything changes.
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3. Live Transfer Handling (P&C Insurance):

Step 1: Live Transfer Introduction

- I can transfer you to one of our property and casualty insurance specialists right now, who can help you review your insurance options and find the best coverage for your property. 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:**
 - **Property Type:**
 - **Location of Property:**
 - **Current Insurance Provider** (if applicable):
 - **Primary Coverage Needs:**
 - **Value of Property:**
 - **Timeline:**

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent 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 [Agent Name] shortly.
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Common Rebuttals (For All Scenarios)

- **Not Interested:**

"I understand, but protecting your property from unexpected risks is crucial. Would you be open to exploring some affordable insurance options at a later time?"

- **Already Have Insurance:**

"That's great! Many of our clients already had coverage, but we helped them find better protection at 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 property and casualty insurance plans that can fit within your budget while still protecting your assets. Would you be open to discussing those options?"

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

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

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Property Type
3. Location of Property
4. Current Insurance Provider (if applicable)
5. Primary Coverage Needs

6. Value of Property
 7. Timeline
 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 property and casualty insurance coverage for your needs. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!

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