**Follow Up & Care Call Script**

**Client Onboarding STEP 21**

Use the following telephone script as a guide to assist you with the Follow Up and Care Call with new clients. Refer to the following page for a Voice Message Script.

* May I speak with [New Client Name] please?
* This is [Your Name] calling from [Credit Union/Organization].
* I'm calling to follow up the recent delivery of your Personal Insurance Organizer and your new Insurance Policy.
* Now that you’ve had some time to review and understand them, I am following up to see if you had any questions?
* Do you know how to best use your Personal Insurance Organizer?
  + ***If yes, answer questions accordingly.***
  + ***If no, proceed to end call.***
* Do you have any questions about your new Insurance Policy?
  + ***If yes, answer questions accordingly.***
  + ***If no, proceed to end call.***
* I’d like go over what you can expect next at this point - ***Reinforce any next steps for the client as appropriate***:
  + ***You may be working on additional insurance solutions so if so, explain what to expect next;***
  + ***You may want to reinforce anything specific to their policy;***
  + ***You may want to mention the renewal process (if applicable); or***
  + ***Anything else you feel is important to discuss with the client.***
* Do you have any other questions or concerns that I can address?
  + ***If yes, answer questions accordingly.***
  + ***If no, proceed to end call.***
* Thank you for your time today [Client Name].
* If there is anything we can help you with, feel free to call anytime.
* It was nice speaking with you – have a great day.
* Good-bye.

**Voice Message Script**

Use the following telephone script as a guide to assist you if the new client’s answering machine picks up.

Due to privacy restrictions, you may be unable to leave detailed information on our client’s voice mail.

* Hello [Client Name], this is [Your Name] calling from [Credit Union/Organization].
* I would like to take a few minutes to answer any questions you may have about your Personal Insurance Organizer or your new Insurance Policy.
* Feel free to contact me at [your phone number].
* I look forward to hearing from you.
* Thank you and have a good day.