

— Your opening sets the tone. Be clear, confident, and create permission to continue. —

1



SIMPLE & DIRECT

"Hey Joe, this is Alisha with State Farm. I have your request for insurance from a local agent. Is it okay if I get that over to you? **Do you prefer phone, text, or email?**"

2



FRIENDLY & RELATIONAL

"Hey Joe, this is Alisha over at State Farm. I saw where you were looking for some insurance information from a local office, and I just wanted to reach out and see the best way to get that to you — **phone, text, or email?**"

3



FAST & EFFICIENT

"Joe, this is Alisha with State Farm calling about your insurance request. I can get everything started for you pretty quickly — what's the easiest way for you to review it, **text, email, or phone?**"

4



VALUE POSITIONING

"Hey Joe, this is Alisha with State Farm. I received your request to look at some insurance options with a local agent. I had a couple quick questions first so we can make sure we're getting you the right information. **Do you have just a minute?**"

5



SOFT & HELPFUL

"Hey Joe, this is Alisha with State Farm. I'm following up on the insurance request you submitted. I just wanted to help get everything pointed in the right direction for you. What's usually easiest for you — **text, email, or a quick phone conversation?**"



GOAL: EARN PERMISSION. START THE CONVERSATION.
MAKE IT EASY FOR THEM TO SAY "YES."

