One Big Media Company

GOHIGHLEVEL SNAPSHOT · INSURANCE AGENCIES (P&C AND LIFE)

# Insurance Agency Sales Kit

Pitch, outreach, pricing and onboarding to land and keep clients in this niche.

© One Big Media Company, LLC · onebigmediacompany.com · Licensed for use in your own agency's client accounts. Not affiliated with HighLevel Inc.

THE OPPORTUNITY

# Selling to insurance

**Your buyer:** An independent or captive P&C and life agency with one to fifteen producers and CSRs, writing personal lines (auto, home, renters, umbrella) and often life and small commercial. They live on quote requests, renewals, and referrals, and they lose money every time a quote sits unanswered or a single-line client never gets offered a second policy.

**Why they buy:**

- Quote requests from your website and lead vendors sit for hours while prospects get called by three other agents
- Renewals roll over with no review, and clients shop elsewhere the moment their premium changes
- Most of your book has one policy with you, and nobody has time to offer home, umbrella, or life
- Producers forget follow-ups on quotes that were 'thinking about it' and the deal quietly dies
- Happy clients never get asked for reviews or referrals, so growth depends on paid leads

## Suggested resale pricing

| Setup fee | Monthly |
|---|---|
| $500-$1,500 | $297-$797 |

Price higher when you also manage lead sources, AMS imports, and monthly reactivation and cross-sell sends. Offer a monthly report on reviews booked and cross-sell reviews to justify retention.

Lead with speed-to-lead on quote requests, because every agent feels that pain, then retain the account with renewal reviews and account rounding that keep producing new policies from the existing book. Report monthly on reviews booked, quotes sent, and cross-sell reviews booked so the owner sees value beyond new leads.

CLOSE

# Pitch script

Quick question: when a quote request comes in from your website or a lead vendor, how long does it usually take before someone calls them back? Most agents tell me it depends on who's in the office. The problem is the prospect usually requested quotes from several places, and the first agent to reach them has a real advantage. We install a system that texts and emails every quote request within moments, asks what lines they need, and follows up for a week until they book a coverage review. But the bigger win is your existing book. It automatically reaches out before every renewal, offers single-line clients a full-account review for home, auto, umbrella, and life, and asks happy clients for reviews and referrals. Your producers just see a pipeline of who to call today. We set it up, brand it to your agency, and manage it monthly. Would it be worth fifteen minutes to see it running on a test quote?

## Cold email

**Subject:** Quote requests at {agency}

Hi {first name},

When a quote request hits your inbox at 8pm, what happens next?

For most agencies, it waits until morning. By then the prospect has heard from two other agents.

We set up a system for insurance agencies that replies to every quote request within moments, books coverage reviews on your calendar, reminds clients before renewal, and offers single-line clients a bundle review automatically.

No new software for your CSRs to learn, and it works alongside your AMS.

Open to a 15-minute look at how it would work for {agency}?

{your name}

## Cold SMS

Hi {first name}, it's {your name}. I help insurance agencies reply to quote requests in moments and auto-book pre-renewal reviews. Worth a quick 15-min look? Reply STOP to opt out.

### Social DM

Hey {first name}, saw {agency} is growing. I build follow-up systems for P&C and life agencies: instant quote replies, renewal reviews, and bundle offers to single-line clients. Open to seeing a quick demo?

DELIVER

# Offers & onboarding

## Offer ideas for the client

- Free side-by-side quote comparison across the carriers you represent
- No-cost pre-renewal coverage review 30-45 days before every renewal
- Home + auto bundle review for single-line clients
- New homeowner coverage check for recent home buyers
- Life insurance needs review during Life Insurance Awareness Month in September

## Client onboarding checklist

- Collect: logo, brand colors, business hours, service area, Google review link
- Get access: domain/DNS, Google Business Profile manager, Facebook/Instagram admin
- Phone: buy or port a number, register A2P 10DLC, set up call forwarding
- Import the customer list (CSV) and tag it for the reactivation campaign
- Fill in the 20 custom values and publish the workflows
- Run a live test: submit the form, miss a call, book an appointment
- Book a 30-day results review with the client

## KPIs to report monthly

- **Speed to first contact**: Every new quote request contacted in under 5 minutes during business hours
- **Quote-to-review booking rate**: Steadily increase the share of quote requests that book a coverage review month over month
- **Quote-to-bind rate**: Track bound policies against quotes sent and aim to improve it every quarter
- **Policies per household**: Increase the number of clients with 2+ lines each quarter through workflow 21
- **Pre-renewal reviews booked**: Book a review with a meaningful share of clients reaching renewal each month
- **New Google reviews**: Earn new Google reviews every month from newly bound clients

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.