

12 Done For You Scripts

The Warm 100 System

Word for word scripts for text, phone, and email outreach

The Producer's Path

These scripts are ready to copy, paste, and personalize. Each one is designed for a specific situation in your warm market outreach. Do not overthink it. Just send them.

TEXT MESSAGE SCRIPTS

Script 1: The Announcement Text

When to use: First contact announcing your new career. Best for close friends and family.

"Hey [Name]! Hope you are doing well. I wanted to let you know I just got my insurance license and launched my own practice here in [City]. I am helping families make sure they are properly protected. If you ever want a second opinion on your coverage, or know someone who might, I am your person!"

Script 2: The Referral Ask Text

When to use: After announcing, ask for referrals. Best for people who responded positively.

"[Name], thanks for the congrats on my insurance practice! Quick question: who do you know that might benefit from reviewing their coverage? I am especially good at helping people save money on health insurance and making sure families have proper life insurance protection. Anyone come to mind?"

Script 3: The Check In Text

When to use: Following up with warm contacts you have not talked to in a while.

"Hey [Name]! Been thinking about you. How have you been? I actually started my own insurance business recently and I am helping [City] families with their coverage. Would love to catch up and see if there is any way I can help you too!"

Script 4: The Specific Offer Text

When to use: When you know their life situation changed (new job, house, baby).

"Hi [Name]! I know you mentioned [situation: new job, house, baby]. Congrats! These life changes are actually perfect times to review insurance coverage. Mind if I take a quick look at your situation and make sure you are not overpaying or missing anything important?"

PHONE CALL SCRIPTS

Script 5: The Warm Call Opening

Duration: 30 to 60 seconds to get to the point. Be natural, not salesy.

"Hey [Name], it is [Your name]! I hope I am not catching you at a bad time. I am calling because I wanted to let you know I just launched my own insurance practice here in [City]. I know insurance is not the most exciting topic, but I have already helped several families save significant money and get better protection. The reason I am calling is I would love to buy you coffee and tell you what I am up to, plus see if there might be a way I can help you with your coverage. Are you free for 30 minutes this week?"

Script 6: The Follow Up Call

When to use: Following up after initial contact with someone who seemed interested.

"Hi [Name], it is [Your name]. We talked last week about my new insurance practice, and you mentioned you might be interested in having me take a look at your coverage. I just wanted to follow up and see if you would like to schedule that conversation. I can probably save you some money and definitely give you peace of mind that you are properly protected. When works better for you, this week or next?"

Script 7: The Coffee Meeting Ask

When to use: Getting face time with higher value contacts.

"[Name], I would love to buy you coffee this week. Not a sales pitch. I just want to tell you about what I am building and get your advice. You have always had great business instincts. Plus, I can take a quick look at your coverage situation while we are at it. When works for you?"

EMAIL SCRIPTS

Script 8: The Personal Announcement Email

Subject: Big news, I launched my insurance practice!

"Hi [Name], I hope this email finds you well! I wanted to share some exciting news. I recently got my insurance license and launched my own practice here in [City]. I am specializing in helping people with health insurance, life insurance, and Medicare. The insurance world has changed a lot, and I have already helped several families save hundreds per month while getting better coverage. I would love to buy you coffee and tell you more, plus take a look at your situation if you are interested. No pressure. When might work this week?"

Script 9: The Professional Network Email

Subject: Insurance review for [Company] alums? (for former colleagues)

"Hi [Name], hope you are doing well at [company]! I recently made a career change into insurance and thought you might be interested. I am now a licensed agent helping families and business owners optimize their coverage. I have been particularly successful helping people who are self employed, between jobs, starting families, or approaching retirement. Would you be open to a brief conversation about your current coverage? And if you know other [company] folks who might benefit, I would appreciate the introduction."

Script 10: The Referral Thank You Email

"Hi [Name], I wanted to personally thank you for referring [Referral Name] to me. I had a great conversation with them and I am confident we will find the right coverage for their situation. Referrals are the lifeblood of my business, and it means a lot that you trust me enough to send someone my way. If anyone else comes to mind, I am always happy to help. Thanks again!"

Script 11: The Post Meeting Follow Up

"Hi [Name], great meeting with you today! As promised, I have attached a summary of the options we discussed. I recommend [Option] based on your situation because [reason]. Next steps: [specific action]. If you have any questions, do not hesitate to call or text me directly. I am here to make this easy for you."

Script 12: The Annual Review Outreach

"Hi [Name], it has been about a year since we set up your [policy type] coverage. I would love to do a quick annual review to make sure you are still getting the best deal and that nothing has changed in your situation. These reviews usually take 15 to 20 minutes and often uncover savings or gaps. When would be a good time this month?"

EXPECTED RESULTS

Results from contacting 100 warm market people using these scripts:

METRIC	TARGET
Response rate	60 to 70%
Show genuine interest	20 to 30%
Schedule appointments	10 to 15%
Become clients	5 to 8%
Referrals per client	2 to 3 additional leads