

---

**Objective:**

Conduct a more engaged, productive conversation by:

- Delivering an effective introduction
- Gaining an agreement from each Contact to participate
- Creating a strong connection with each Contact

Applying these best practices will produce consistent results and become the foundation for future personalization.

**Script Framework:**

Marketing Rep	Hello! This is [Marketing Rep] from <COMPANY>. Is [Producer] available?
Gatekeeper	Who?
Marketing Rep	<b>[Marketing Rep], from &lt;COMPANY&gt;.</b> —pause, and if asked...— <b>I’m calling about Property insurance.</b>
Gatekeeper	One moment.
Producer	Hi, this is [Producer]
Marketing Rep	<b>Hi [Producer]! This is [Marketing Rep] from &lt;COMPANY&gt;.</b> —pause— <b>Did I catch you at a bad time?</b>  <i>Note: Phrase this as a question and don’t answer it for them. Swapping “bad time” with “good time” will not get the same result. This phrasing gets their attention in a way that breaks their focus from whatever they were doing, and directs it to you.</i>
Producer	No, now’s not a bad time.
Marketing Rep	<b>Great! Do you have just a few minutes to talk about...</b>  <i>Examples: ...your recent request to quote and write Property? ...the [event] you recently attended? ...an upcoming event we’re hosting in [City]?</i> —wait for their response—  <i>Note: An affirmative response to this type of question is their agreement to participate in the conversation. A negative response is your opportunity to get their commitment to a better time.</i>
Producer	Sure.

---

Marketing Rep	<p><i>Note: Now they are committed to having a conversation! Start to dig deeper and create engagement: Ask anything that helps you find out <u>Why</u> &lt;COMPANY&gt;? Why <u>now</u>? or <u>Why</u> would attending the workshop be a good decision <u>for them</u>?</i></p> <p><b>Perfect, I appreciate your time. [Producer], I'm curious...</b></p> <p><i>Examples: ...what made you to register now? ...what brought you to the [event]? ...what's your experience level with Property? OR ...are you interested in getting in on the Property opportunities in your area?</i></p> <p><i>Reminder: This is <u>not</u> "a quick follow up" call or "a check in" or "just a heads up about a workshop".</i></p>
Producer	<p>I recently had a customer who needed a Property policy.</p> <p>OR</p> <p>I don't know enough about Property to go after that business.</p>
Marketing Rep	<p><b>Oh, it's great they brought the opportunity to you.</b></p> <p><b>What lines of business do you typically focus on?</b></p> <p>OR</p> <p><b>Well, I'm glad we connected today! We're hosting a lunch-and-learn workshop in your area next month. It's a great opportunity to learn more about Zurich's Property product and how to take advantage of the growth in [City]!</b></p>

#### Tips to get through the gatekeeper:

- Don't sound like a used car salesman. You're an insurance professional reaching out to another insurance professional.
- Be sure to check Salesforce to see if there's a nickname for the Contact. Use it.
- Use your first name only. Depending on the situation (such as call notes showing the gatekeeper turning us away), avoid using <COMPANY> in your opening. You'll let the producer know more about who you are.
- If the gatekeeper asks why you're calling, tell them you need to speak to the agent about Property insurance. Gatekeepers don't want to be responsible for turning away potential customers.

Example:

Marketing Rep	Hello! This is Bill. Is Steve available?
Gatekeeper	What is this regarding?
Marketing Rep	Property insurance.

---

**If you're getting closed ended responses from the Contact:**

- Check your tone – is it enthusiastic and professional? Do you sound like you're trying to selling them something? Tone carries more weight than words.
- Re-evaluate the questions you're asking. Try a different approach – ask different question. If you're talking about a project, shift to talking about the agent or agency themselves.

