

Voice Recorded Change Form
(Auto)

Mr./Mrs. _____, to make this change much easier and to save time (and possibly even a tree or two), we can process your change request with a recorded statement now rather than a paper statement later. Would that be okay with you?

Ok great. Now let's get started.

Please verify your full address _____. Thank you.

Please verify your date of birth _____. Thank you.

And last question, please verify the last four digits of your driver's license number _____.

Perfect, thank you!

I will now read a statement to record for your authorization to make this change. When I am done, please clearly say "yes", if you agree.

"Per this conversation, you would like us to make the following change to policy # _____.

Example: Delete vehicle number ____ year make model and last four of VIN.

Decrease liability coverages from ____ to ____.

Remove physical damage coverage.

Increase physical damage deductibles from ____ to ____.

Remove driver number ____ state name and reason for removal."

Ok great. And again, by saying "yes" at the end of this recorded authorization, you are confirming your authority to make these changes and understanding that the changes are valid and effective [DATE AND TIME] just as if you had read and signed a paper statement authorizing me to make those changes for you today.

After the client says "Yes", then reply "Thank you Mr./Mrs. _____. Is there anything else that I can help you with today?" If the client says "No", then simply reply "Ok, have a great day."

How to document the file: Include the in-bound phone number in the activity immediately after the call taking place so that we can easily located the recorded call, if needed.