

Sample Auto Live Transfer Script from HBW Leads

Introduction:

Hello, this is [Telemarketer's Name] calling on behalf of [Agency Name/Carrier]. We are offering comparison quotes to drivers in your area as the market has recently changed. If I could gather some brief information, I can transfer you to someone in our office who can get you that quote. Before I go any further, I'd like to mention that this call is being recorded. May I/do I have your permission to continue?

Qualifying Questions

- Can I please verify your name?
- Who do you have your current auto insurance with?
- How many vehicles are on your policy?
- How many drivers are on your policy?
- Have you had any tickets or accidents in the last 3 years?
- Can you verify your address?
- Can you confirm your phone number quickly in case you are disconnected so that we can get a hold of you. [Read phone number]. Is that correct?

Perfect, I am going to connect us with a licensed insurance specialist so that they can take over this call and provide an accurate quote.

**Telemarketer will stay on the line with prospective customer while initiating transfer to licensed professional.*

Warm Transfer To Licensed Professional Script:

Hello, this is [Telemarketer's Name] calling with HBW Leads.

I have [Prospective Customer's Name] on the phone. They are interested in getting a comparison quote on [his/her] auto insurance.

This is [Prospective Customer's Name]. They are insured with [Prior Carrier] they have [#] vehicles. They have [#] drivers. Their best contact number is [Prospective Customer's Confirmed Phone Number]. Are you ready for the transfer?



When Everyone Is Connected:

[Prospective Customer's Name], I have [Licensed Professional's Name], an [Carrier Name] professional on the line to go over what [Carrier Name] can do for you. It's been a pleasure talking to you and have a wonderful day.

In the event that the agent is unavailable to answer the phone for the transfer, we have a protocol in place to ensure a seamless transition for the lead. In such cases, the lead will automatically switch to the script designed specifically for our exclusive emailed auto leads. Our telemarketers will verify all policy details (e.g.: year, make, and models of vehicles insured, coverage, etc.) Prospects will be set up to expect a callback from your agency within 24 hours, and the lead details will be sent via email. This process allows us to maintain efficiency and ensure that no opportunities are missed. All leads, transferred or emailed, will be charged the transfer price.