

Sample Auto Live Transfer Script from HBW Leads

Introduction:

Hello, this is **[Telemarketer's Name]** calling on behalf of **[Agency Name/Carrier]** on a recorded line. How are you today? 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. Do I have your permission to continue?

- Am I speaking with **[Prospect's Name]**?
- Who do you have your current auto insurance with?
- How long have you been with this insurance carrier?
- If less than a year, have you had continuous coverage for a year?
- What is your DOB?
 - Ask for age if they do not want to provide the DOB.
- Can you verify your address?

Perfect, I am going to connect us with a licensed Allstate insurance specialist so that they can take over this call and get that quote for you. You're going to hear a recording, and then the rep will pick up the line. I will be on the line with you and introduce you to the licensed rep before they take over.

**Telemarketer will NOT put the prospect on hold and follow the script below before completing the transfer.*

Warm Transfer To Licensed Professional Script:

Hello, this is **[Telemarketer's Name]** calling with HBW Leads. I have **[Prospect's Name]** on the phone. They are interested in getting a comparison quote on **[his/her]** auto insurance. They have been insured with **[Current Carrier]** for **[#]** years. Were you able to capture this? **[If yes]** Perfect, **[Prospect's Name]** I am going to leave you in good hands of **[Current Carrier]**. Thank you.

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