

TELEPHONING

Thank you for calling [*company name*]. How can I help you today?

What type of insurance are you interested in?

What specific question do you have about your coverage?

I'll be happy to assist you with your claim. Can you please provide me with your policy number?

I'll need to file a claim and assign an adjuster to your case. The adjuster will be in touch with you shortly to go over the details and answer any questions you may have.

Is there anything else I can assist you with?

Our ... policies provide coverage for your home and personal property/ flood insurance/ liability protection.....

The cost of the policy depends on several factors, such as the value of your home, your location, your coverage needs.....

SCENARIO 1:

INSURER

1. Welcome the customer
2. Ask the customer which insurance he/she is interested in
3. Introduce the insurance. Explain what it covers – home and personal property
4. Explain that the price depends on the value of the home, the location. Ask the customer to provide details about it.
5. State the cost of the insurance and ask if the customer is happy about the conditions
6. Agree with what the customer wants.
7. Ask the customer for his/her name and email address.
8. Thank the customer for choosing your company and taking out the insurance policy

SCENARIO 2:

CUSTOMER

1. Say that you are not sure what your policy covers
2. Dictate your policy number (.....) and birth date.
3. Ask if your policy covers also rental policy because you would like to rent a car during your holiday.
4. Ask what you should do if you have an accident.
5. Thank the insurer for the help.

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SCENARIO 1:

CUSTOMER

1. Say that you would like to take out an insurance policy, do not say which one.
2. Say that you would like homeowners insurance. Ask what the insurance covers.
3. Ask how much it costs.
4. Give details about your home.
5. You disagree with the price. Ask for a discount.
6. You agree and take out the policy.
7. Provide the insurer with the information he/she needs

SCENARIO 2:

INSURER

1. Welcome the customer and ask how you can help
2. Ask for the policy number and the birth date.
3. Say that you can see the policy and ask the customer what information he/ she would like to know
4. Confirm that the policy covers the rental cars and there is no need for additional coverage.
5. Say that you would need to file a claim and assign an adjuster to the case. The adjuster will be in touch as quickly as possible.
6. Thank the customer for choosing your company.