**Check-in Phone Call Script**

Hello CLIENT NAME

This is AGENT NAME from AGENCY OR NAME OF BUSINESS. I wanted to take a moment to check-in and see how you are doing.

Is now a good time to chat?

**No:**No problem. Is there another time I can call you?

*\_confirm new time and close call\_*

**Yes**: Great!

*\_continue with conversation\_*

Are you doing well? How is your family? Do you have any questions or concerns I can help you with?

Your well-being is very important to me, so please call or email me anytime. Do you have my phone number and email address?

Let me know if you would ever like to meet about your insurance coverage so I can answer any questions you may have.

Thank you for your time today. Talk to you again soon.

**Check-in Voicemail Script**

Hello CLIENT NAME

This is AGENT NAME from AGENCY OR NAME OF BUSINESS. I am calling to check-in and see how you are doing. Please feel free to give me a call back at AGENT PHONE NUMBER or send me an email to AGENT EMAIL. I hope to talk to you soon.