Paragraph

About us

Subject line: A Message from [Agency name]'s CEO

Dear [Customer First Name],

I just wanted to take a moment to thank you for your business! I know you have other choices for insurance, so I appreciate your support for our local agency.

A little bit about us: I started [Agency name] in [YYYY], right here in [town name]. I worked at a large insurance carrier for over [XX] years, but I wanted to meet and serve this community on a more personal level.

My dedicated team at [Agency name] is united in our drive to provide the best insurance services and prices. When disaster strikes or you experience a big life event, we are passionate about giving you the coverage you deserve.

To learn more about our many policy lines, including [LOB], [LOB], [etc.], feel free to reach out at any time! We hope that you enjoy your experience with us! If you ever have a need or question, don't hesitate to reach out.

Best wishes,

[CEO Signature]

Cancelation

Subject line: Policy Cancelation Notice

Dear [Customer First Name],

Your [LOB] policy has been canceled as of [MM/DD/YYYY]. Coverage provided by this policy has been terminated.

[policy details]

If this was done in error, please contact us immediately at [phone number] or [email address] to resume your coverage. Otherwise, best wishes for your future!

Sincerely,

[Account Manager Signature]

Certificate

Subject line: Your Policy Certificate

Dear [Customer First Name],

The certificate for your [LOB] policy is attached. Here is a summary of your policy information:

[policy info]

If you see any inaccuracies or would like to make a change, please don't hesitate to contact us!

Sincerely,

[Account Manager Signature]

Cross-sell - Company

Subject line: Coverage Recommedations

Dear [Customer First Name],

Thank you for purchasing a[n] [LOB] policy with us! We provide other types of coverage that could be a good fit for your needs, plus bundling policies always offers additional savings!

[XX]% of companies like you purchase [LOB] policies
[XX]% of companies like you purchase [LOB] policies
[XX]% of companies like you purchase [LOB] policies

Are you interested in learning more about these coverages? If so, let me know and we will get your covered!

Sincerely,

[Account Manager Signature]

Cross-sell - Individual

Subject line: Coverage Recommedations

Dear [Customer First Name],

Thank you for purchasing a[n] [LOB] policy with us! We provide other types of coverage that could be a good fit for your needs, plus bundling policies always offers additional savings!

[XX]% of people like you purchase [LOB] policies
[XX]% of people like you purchase [LOB] policies
[XX]% of people like you purchase [LOB] policies

Are you interested in learning more about these coverages? If so, let me know and we will get your covered!

Sincerely,

[Account Manager Signature]

Happy birthday

Subject line: Happy Birthday from [Agency name]!

Dear [Customer First Name],

All of us at [Agency name] wish you a very Happy Birthday and hope you have another year of accomplishments, opportunities, and joy. Congratulations on another fine year!

Sincerely,

[Account Manager Signature]

Happy holidays

Subject line: Happy Holidays from [Agency name]!

Dear [Customer First Name],

All of us at [Agency name] wish you a happy holiday season! We hope you cherish time with your loved ones and we're excited to serve you in the New Year!

Sincerely,

[Account Manager Signature]

Natural disaster - Hurricane

Subject line: Prepare for Hurricane [Name]

Dear [Customer First Name],

As Hurricane [Name] approaches, we at [Agency name] are here to address any of your questions or concerns. Please be safe and know that our team is dedicated to serving you before, during, and after the storm.

Here are a few ways to protect your property against wind and water damage, provided by FEMA:

- Reinforce or strengthen your doors, windows, walls, and roofs
- Bring loose, lightweight objects (e.g., patio furniture, garbage cans, and bicycles) inside
- Anchor objects that would be unsafe inside (e.g., gas grills and propane tanks)
- Trim or remove trees that could fall on buildings
- Keep gutters and drains free of debris
- Install a water alarm and sump pumps with battery backup
- Install "check valves" in sewer lines to prevent floodwater from backing up into your drains
- Stockpile emergency materials such as plywood, plastic sheeting, and sandbags
- Elevate the heating system (furnace), water heater, and electric panel, if susceptible to flooding
- Waterproof the basement

If you would like to upgrade your coverage, add flood insurance, or make any changes to your policy, please contact us immediately.

Sincerely,

[Account Manager Signature]

Newsletter

Subject line: [Agency name] Newsletter

Dear [Customer First Name],

Hello! The team at [Agency name] has some important news to share.

- Hurricane [Name] is now a Category [X] hurricane and should make landfall in [location] in [X] days. Please visit https://www.fema.gov or contact your agent to learn more about how to protect yourself and your property.
- We will be closed on [Day], [Date] for [reason]. We apologize for any inconvenience.

- We have [X] new agents! Please welcome [Name] and [Name] to the team! [Name] will focus on new homeowners and [Name] is excited to help personal auto customers!

As always, feel free to contact us with any questions or changes to your coverage.

Take care,

[Account Manager Signature]

Quote follow-up

Subject line: Following up on [LOB] quote

Dear [Customer First Name],

Just wanted to check-in and see if you have any questions about your [LOB] quote. Here is the premium and coverage information:

[Policy info]

Please let us know if you'd like to discuss this quote. We look forward to serving you!

Sincerely,

[Account Manager Signature]

Renewal

Subject line: [LOB] Policy Expires Soon - Renew Now