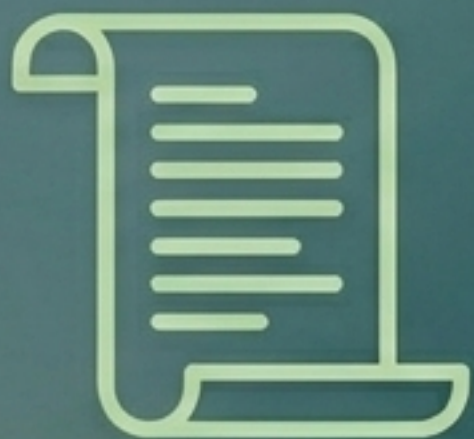


Insurance Agent Outreach: Texts and Emails That Work

The Outreach Freeze

- Staring at the screen
- Overthinking every word
- Sending a sales pitch or nothing at all

It Is Not Bad Timing It Is Bad Tone



Sounds like
reading a script



Trying to close a
deal in one text



Prospects feel the
pressure and tune
out

The Winning Formula

Short • Personal • Offer Help





The Warm Text

For people you already know

Hey Mark, hope you are doing well. I wanted to let you know I have been helping people in the area with their Medicare and health coverage options. If you or anyone you know ever has questions or wants a second opinion on what they have, I would love to help. No rush at all, just wanted you to know I am here for that.

Strategy: Opens the door without asking for anything



The No-Pressure Follow-Up

When someone shows interest but delays

Hey [name], just checking in. I know we talked about taking a look at your coverage options. Whenever you are ready, I am happy to sit down for a few minutes and walk through what is available. **No pressure**, just did not want you to think I forgot about you.

Strategy: The key phrase is **no pressure**



The Referral Email

Subject: Monica suggested I reach out

Hi Mark,

Monica mentioned you might have some questions about your Medicare coverage. I help people in the area compare their options and make sure they are getting the best fit for their situation. I would be happy to answer any questions you have, no obligation at all. Feel free to reply here or give me a call whenever it is convenient.

Strategy: The referrer's name does the heavy lifting

Golden Rules of Outreach

1

Personalize every message before sending

2

Lead with help, never with your product

3

Stop after 2 follow-ups to avoid harassment

Keep It Brief

5

Sentences Max
for Texts

8

Sentences Max
for Emails

If it requires scrolling, it is too long

The Instant Delete

Hi, my name is [name] and I am a licensed insurance agent specializing in Medicare Advantage, Medicare Supplement, and ancillary products. **I would love to schedule a 15-minute call to review your current coverage and discuss options that could save you money.**

The Problem: Sounds exactly like a form letter

Pitch vs. Offer

The Pitch

Me-focused

Lists products

Demands 15 minutes

The Offer

[✓] Them-focused

[✓] Offers help

[✓] No obligation

Start The Conversation



- ✓ Pick 3 people from your contact list
- ✓ Personalize the warm text template
- ✓ Hit send today

Do not wait for the perfect message