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POLICY-RELATED
EMAIL TEMPLATES

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Policies are the main product and service you sell to provide value to your clients, whether you sell to individuals or groups.

Clients value communication from their agents and advisors. By ensuring you communicate proactively with clients regarding their policies, you're demonstrating that you value the relationship as well.

When you manage your policies in an agency management system (AMS), identifying opportunities to communicate becomes a lot easier. Use tools within your AMS like reporting, email marketing, and workflow automation to deliver the message to the right person at the right time.

These plain-text templates provide you with messaging you can take and use immediately. They're completely flexible, so you can edit as needed.

After the templates, you'll see Automated Workflow and Email Campaigns mentioned. These are tools within AgencyBloc. Automated Workflows are used to automate repetitive tasks or communication. They work by assigning an activity or sending an email when a "trigger" occurs. Learn more about Automated Workflows *in this guide*.

Email Marketing is another feature within AgencyBloc that allows agencies to send one-time, mass emails or drip-email campaigns. Audience lists (including certain carrier or product lists) can be created using several filters and criteria. Learn more about Email Marketing *here*.

Templates included:

- Policy Application Submitted
- Client Welcome
- Policy Renewal is Approaching (Individual & Group)
- Carrier Changes
- Policy Termination (Client alert & Follow-up)

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Variable Data Fields

Variable data fields are special fields that populate with information from records in your account. For example, agent and client names, addresses, and policy information. Variable data is useful when you want to send your recipients information that is unique to each person, such as contract numbers or policy numbers, via automated workflows or email campaigns.

AgencyBloc Variable Data Fields Used in These Templates:

[GroupName]	Group / Employer Client's Name
[GrpAMFirstName]	Group Account Manager's First Name
[GrpAMLastName]	Group Account Manager's Last Name
[IndFirstName]	Individual Client's First Name
[PolAORFirstName]	Servicing Agent's First Name
[PolAORLastName]	Servicing Agent's Last Name
[PolNumber]	Policy Number
[PolCarrier]	Policy Carrier
[PolCoverageType]	Policy Coverage Type
[PolRenewal]	Policy Renewal Date
[AOREmail]	Policy Servicing Agent's Email Address
[BusinessName]	Business / Agency's Name

All Variable Data field options within AgencyBloc can be found at the end of these templates.

In some email templates, you will notice information styled [like this]. That indicates an area where you would need to manually enter personalized information that cannot be handled with variable data.

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POLICY APPLICATION SUBMITTED

Send this email to your client when their policy's application has been submitted.

To: Your Client
Subject: Your policy application has been submitted

Hi [IndFirstName],

Your policy application for policy, [PolNumber], has been submitted. I will stay in close contact as it moves through the process. Please let me know if you have any questions in the meantime!

Thank you!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to automate: Use AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (individual or group clients, policy status, etc.) and choosing how quickly (ASAP or delay a certain timeframe) you want it to send.

You could also use AgencyBloc's Automated Workflow in this scenario to automatically assign a task or send an email to the policy's agent of record as confirmation that the policy application has been submitted.

NEW CLIENT WELCOME

Send this welcome email to your client when a new policy is created.

To: Your Client
Subject: Welcome to [BusinessName]!

Hi [IndFirstName],

Welcome to [BusinessName]! I wanted to thank you again for trusting me with your insurance needs, and I look forward to partnering together.

Please let me know if there are any questions or concerns I can address at this time. I'll make it a point to reach out throughout the year and stay proactive when communicating with you.

Thank you!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to automate: Use AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (type of recipients, policy status, etc.) and choosing how soon after the new policy is created to send.

You could also use AgencyBloc's Automated Workflow to assign a task to the policy's agent of record to have them review the policy and reach out personally to the client when necessary, like to review the policy's carrier contact info, billing & payment, etc.

POLICY RENEWAL - INDIVIDUAL

Send this email to your client when their policy renewal date is approaching.

To: Your Individual Client
Subject: Your policy's renewal date is approaching

Hi [IndFirstName],

Your [PolCarrier] [PolCoverageType] policy is up for renewal on [PolRenewal].

I want to start the renewal conversation sooner rather than later, so when would be a good time to meet or jump on a call to discuss?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to automate: Using AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (recipients, policy status, carrier & coverage type, etc.) and choosing how soon before the policy renewal date you'd like it to send.

You could also use AgencyBloc's Automated Workflow in this scenario to automatically assign a task to the policy's agent of record as an alert of the upcoming renewal.

POLICY RENEWAL - GROUP/EMPLOYER

Send this email to your group/employer client when their policy renewal date is approaching.

To: Your Group/Employer Client
Subject: Your policy's renewal date is approaching

Hi [IndFirstName],

Your group's [PolCarrier] [PolCoverageType] policy is up for renewal on [PolRenewal].

I want to start the renewal conversation sooner rather than later, so when would be a good time to meet or jump on a call?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to automate: Use AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (recipients, policy status, carrier & coverage type, etc.) and choosing how soon before the policy renewal date you'd like it to send.

You could also use AgencyBloc's Automated Workflow in this scenario to automatically assign a task to the policy's agent of record as an alert of the upcoming renewal.

CARRIER CHANGE NOTIFICATION

Send this email to your clients affected by a plan or carrier change.

To: Your Client
Subject: Alerting you of carrier changes

Hi [IndFirstName],

I'm reaching out because [PolCarrier] has made some changes that affect your [PolCoverageType] policy.

[Enter carrier change information here]

Please let me know if you have any questions or concerns. I'm here to help!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to send: Use AgencyBloc's Email Marketing, this email can be personalized and sent by selecting criteria (recipients, carrier, product type, etc.).

This email should include all relevant details regarding the carrier or product change, how it affects the client, and what your recommendations are going forward.

However, depending on the gravity of the carrier or product change, you may make the decision to run a report for the list of affected clients and reach out individually.

POLICY CANCELLATION/TERMINATION - CLIENT

Send this email to your individual or group/employer client when a policy is canceled/terminated.

To: Your Group/Employer Client
Subject: Checking in - your policy was terminated

Hi [IndFirstName],

Your [PolCarrier] [PolCoverageType] policy was [terminated/canceled].

If this was intentional, no action is needed on your part. If this was not intentional or you have questions for me, please call me at [AORBusinessPhone] or email me at [AOREmail].

I'll plan to reach out if I don't hear from you.

Thanks!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to automate: Use AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (recipients, policy status updated to canceled, etc.) and choosing how soon after the policy was canceled that you'd like to send.

You could also use AgencyBloc's Automated Workflow in this scenario to automatically assign a task to the policy's agent of record as an alert of the termination/cancellation.

POLICY CANCELLATION/TERMINATION - AGENT

Send this email to the policy's agent of record when a policy is canceled/terminated.

To: The policy's agent of record
Subject: Your client's policy was terminated

Hi [PolAORFirstName],

This is an alert that [IndFirstName] [IndLastName]'s [PolCarrier] [PolCoverageType] policy was [terminated/canceled].

If you're aware and this was intentional, no action is needed. If you weren't aware, please reach out to the policyholder ASAP to ensure this isn't an accident.

Thanks!

[BusinessName]

How to automate: Use AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (recipients, policy status updated to canceled, etc.) and choosing how soon after the policy was canceled that you'd like to send.

You could also use AgencyBloc's Automated Workflow in this scenario to automatically assign a task (instead of sending this email) to the policy's agent of record as an alert of the termination/cancellation.

POLICY CANCELLATION/TERMINATION - FOLLOW-UP

Send this email to your individual or group/employer client 6 months after a policy was canceled/terminated.

To: Your Client
Subject: Following-up on your canceled policy

Hi [IndFirstName],

I'm following-up on the [PolCarrier] [PolCoverageType] policy that was [terminated/canceled] about 6 months ago.

Have you found replacement coverage? Are there currently any other needs I can help you meet or any gaps I can help fill?

I'd love to help!

Thanks!

[PolAORFirstName] [PolAORLastName]
[AORBusinessPhone]
[BusinessName]

How to automate: Use AgencyBloc's Automated Workflow, this email can be automated by selecting criteria (recipients, policy coverage type, etc.) and choosing how soon after the policy was canceled (6 months in this example) that you'd like to send.

You could also use AgencyBloc's Automated Workflow in this scenario to automatically assign a task (instead of sending this email) to the policy's agent of record to follow-up with the client. **This might be the better option as the agent will then have a chance to check the client's current coverage and reach out with tailored suggestions.**

Other Variable Data Available to Use in AgencyBloc

Using Email Marketing, you can add variable data for:

Message Type	Variable Data
Individual (Client)	» Individual name, address, and contact information » Servicing agent name, address, and contact information
Group (or Employer)	» Group name and DBA (Doing Business As) » Account manager name » Servicing agent name, address, and contact information
Policy	» Policy number » Policy dates » Servicing agent name, address, and contact information
Business (Your Agency)	» Your agency's company info

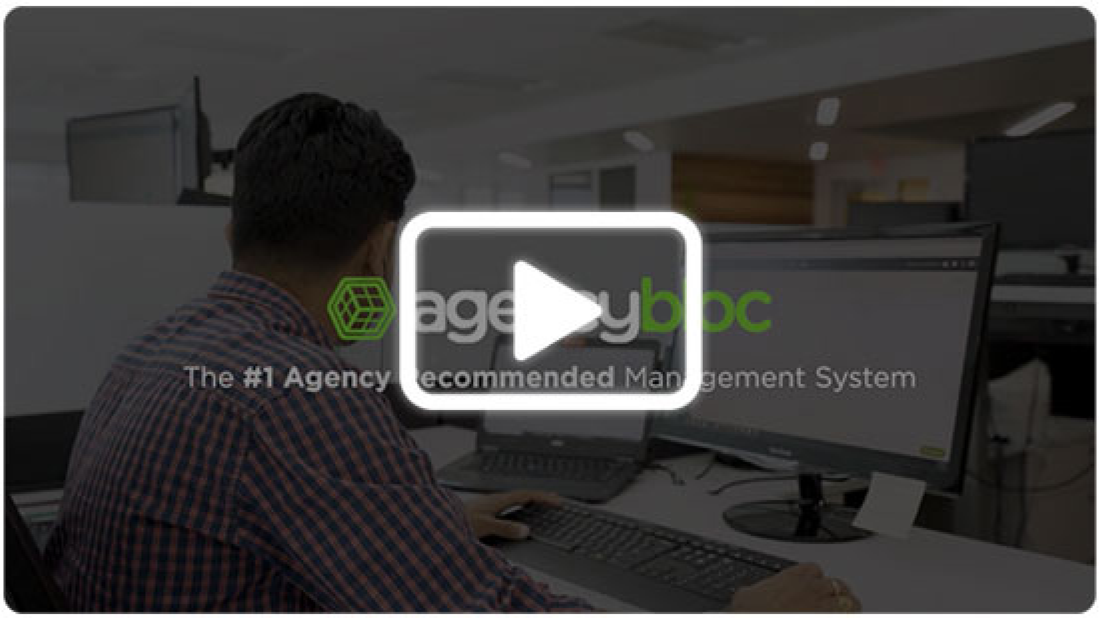
Using Automated Workflows, you can add variable data for:

Message Type	Variable Data
Individual (Client)	» Individual name, address, and contact information » Servicing agent name, address, and contact information
Individual Activity	» Subject, priority, status, type » Follow up date » Follow up start time
Group (or Employer)	» Group name and DBA (Doing Business As) » Account manager name » Servicing agent name, address, and contact information
Group Activity	» Subject, priority, status, type » Follow up date » Follow up start time
Policy	» Policy number » Policy dates » Servicing agent name, address, and contact information
Agent	» Agent name and address
Agent Activity	» Subject, priority, status, type » Follow up date » Follow up start time
Agent Contract	» Contract carrier » Contract state » Contract date » Contract agent numbers » Contract agent Medicare number
Agent License	» License number » License state
Business (Your Agency)	» Your agency's company info

LEARN MORE ABOUT AGENCYBLOC

AgencyBloc is an agency management system that helps life and health insurance agencies grow their business with an industry-specific CRM, commissions processing, and integrated business and marketing automation.

Learn more in this 5-minute overview video:



Tara W.
Westhouse Insurance Agency, LLC

"We have found AgencyBloc invaluable to the organization of our client data. We use reports to help us set goals and track progress, **email marketing to reach out to clients on a regular basis, automated workflow to make sure we do not miss important tasks**, and notes and activities to assign future tasks! This program has helped us to be more efficient and professional.**"**

Ready to dive deeper into what AgencyBloc offers?

Sign up for a live, one-on-one demo of AgencyBloc.

You'll be able to discuss your agency's specific needs and see AgencyBloc in action.