



Service Email Templates

1. WELCOME EMAIL

SUBJECT LINE: [Client] - Welcome to [Your Company]!

Hello [First Name],

We are thrilled to have you as a new client at our [YOUR COMPANY] insurance agency!

We pride ourselves on providing our clients with the best possible service, and we are excited to help you with your insurance needs.

A physical copy of your Evidence of Insurance and ID Cards will be mailed to you within three weeks, but I have attached a copy of the ID Cards to this email.

Here's what you need to know in terms of the next steps:

1) SIGNING YOUR POLICY DOCUMENTS

Before our scheduled Onboarding Appointment, please sign the documents that we emailed to you to retain your discounts.

It is important to do this as soon as possible to avoid any increase in your insurance premium.

You will receive multiple DocuSign emails from [YOUR COMPANY] - please sign all of them to keep your discounts.

If you need any assistance with signing these documents, please let me know!

2) CREATE [YOUR COMPANY] ONLINE ACCOUNT

To manage your payments, view policy documents, edit paperless billing preferences, and access your ID Cards, please create an account on our online portal by following this link: [LINK].

3) PAPERLESS COMMUNICATION

To avoid a \$2 Service Fee, please accept paperless communication by logging in to [YOUR COMPANY] online account and "Accept Paperless Communication."

4) ONBOARDING CALL

We always connect with our new clients for a brief Onboarding Appointment via Zoom to review your coverage and make sure you have signed all the necessary documents.

Your Onboarding Appointment is scheduled for [ONBOARDING DATE] at [ONBOARDING TIME].

If you have any questions about your policy or the items outlined above, please don't hesitate to ask during the call or give us a call directly at XXX-XXX-XXXX.

We look forward to working with you for many years to come!

Best regards,

[EMAIL SIGNATURE]





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2. PAYMENT RETURNED

SUBJECT LINE: [Client] - Missed payment with [Your Company]

Hi [CLIENT],

I hope you're doing well!

I wanted to reach out to you regarding an issue with your recent payment to [YOUR COMPANY].

It appears that the payment was returned by your bank, and I'd like to resolve this issue as soon as possible in order to avoid any issues with cancellation.

To make the payment, you can either log in to your [YOUR COMPANY] portal and process it online, or you can call us at XXX-XXX-XXX and we can assist you with making the payment over the phone.

If you have any questions or need assistance, please don't hesitate to let us know. We are here to help.

Is there a convenient time for you to take care of this payment today?

I appreciate your prompt attention to this matter.

Thank you,

[EMAIL SIGNATURE]





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3. PENDING CANCELATION DUE TO NON PAY

SUBJECT LINE: [Client] - Avoid Cancellation Due To Non Pay

Hi [CLIENT],

I hope you're doing well!

I wanted to reach out to you with some important information about your insurance policy.

It appears that your payment to [YOUR COMPANY] was returned by your bank, and as a result, your policy is scheduled to be canceled.

I understand that a cancellation can be inconvenient and may make it difficult to secure a competitive insurance rate in the future.

That's why I'm reaching out to see if we can take care of this issue today.

To avoid the cancellation of your policy, you can either log in to your [YOUR COMPANY] portal and process the payment online, or you can call us at XXX-XXX-XXXX and we can assist you with making the payment over the phone.

If you have any questions or need assistance, please don't hesitate to let us know. We are here to help.

Is that something you can do today?

Thank you in advance for your prompt attention to this matter.

[EMAIL SIGNATURE]





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4. MISSING SIGNATURE FOR REQUIRED DOCUMENTS

SUBJECT LINE: [Client] - Action required to keep policy discount

Hi [CLIENT],

I hope you're doing well!

[YOUR COMPANY] recently emailed you important documents that need to be signed in order to retain the discounts that were applied to your policy.

If the documents are not signed, the discounts will be removed and your rate will go up, which we want to avoid.

Are you able to sign those documents today to avoid the discounts from being removed?

If you have any questions or need assistance with signing the documents, please don't hesitate to contact me, I'd be happy to help!

Once you have signed the documents, please reply to this email so that I can update our records accordingly.

Thank you!

Best regards,

[EMAIL SIGNATURE]

