

Lead Generation Automation Templates

Feel free to swap out [Canopy Connect](#) for any data intake platform or gravity/jot form landing pages.

Day 1: Email 1

Subject: Let's Get Your Home Covered!

Hi [Prospect's Name],

Thanks for requesting a homeowners insurance quote! I'm [Your Name] from [Agency Name], and I'm here to help you find the best coverage for your home.

How we do things might be a little different than you're used to, but we do this intentionally.

We want to make your insurance experience as low-stress as possible, so I've got three ways we can get your quote started. You pick the way you want to work with us.

- 1) Simply pick up the phone and we can collect the information we need to get your quote started.
- 2) (Fill out this form)[quote intake form link] that also collects that same information.
- 3) (Using this secure link)[canopy link] you can send us the information in seconds.

Once we've got that information our team can start finding you the best coverages at the best price.

Looking forward to helping you protect your home!

Best,
[Your Name]

Day 1: Email 2

Subject: Quick Follow-Up: Your Home Insurance Quote

Hi [Prospect's Name],

Just wanted to follow up and make sure we get you the best homeowners insurance. Our process is smooth and straightforward.

Let's set up a time to chat about your insurance needs. If a call isn't convenient, our Canopy Connect link [insert link here] makes it super easy to get started online.

Talk soon!

Best,
[Your Name]

Day 1: Text Message

Hi [Prospect's Name], this is [Your Name] from [Agency Name]. Thanks for requesting a homeowners insurance quote! Do you have a few minutes to get started? Or use our Canopy Connect link [insert link here] to get started online.

Day 2: Email 3

Subject: Let's Secure Your Home Insurance Today

Hi [Prospect's Name],

I wanted to check in and see if you have any questions about the homeowners insurance quote you requested. Our goal is to find the best coverage at the best price for you.

Can we set up a quick call to go over the details? Or, if it's easier, you can use our Canopy Connect link [insert link here] to provide the necessary information.

Looking forward to assisting you!

Best,
[Your Name]

Day 2: Text Message

Hi [Prospect's Name], this is [Your Name] from [Agency Name]. Thanks for requesting a homeowners insurance quote! You can call us at this number or use our Canopy Connect link [insert link here].

Day 4: Email 4

Subject: Let's Finalize Your Home Insurance Coverage

Hi [Prospect's Name],

I hope you're doing well! I wanted to reach out again regarding your homeowners insurance quote. We're dedicated to finding the best policy for your needs.

Can we set up a call to finalize everything? Or you can use our Canopy Connect link [insert link here] to move forward online.

Looking forward to hearing from you!

Best,
[Your Name]

Day 4: Text Message

Hi [Prospect's Name], [Your Name] from [Agency Name] here. Let's finalize your homeowners insurance. We can do it over the phone if you prefer that.

Day 7: Email 5

Subject: Don't Miss Out on the Best Home Insurance Rates

Hi [Prospect's Name],

I wanted to remind you about the homeowners insurance quote you requested. We're here to help you get the best coverage at the best rates.

Can we set up a quick call to finalize everything? Alternatively, our Canopy Connect link [insert link here] makes it easy to complete online.

Looking forward to helping you secure your home!

Best,
[Your Name]

Day 7: Text Message

Hi [Prospect's Name], [Your Name] from [Agency Name] here. Let's finalize your homeowners insurance. Reach out at this number or use our Canopy Connect link [insert link here].

Day 10: Email 6

Subject: Hey, [First Name]

Hi [Prospect's Name],

Are you still looking for homeowners insurance coverage?

Best,
[Your Name]

Day 10: Text Message

Hi [Prospect's Name], it's [Your Name] from [Agency Name]. Still need help with your homeowners insurance? Call us at this number or use our Canopy Connect link [insert link here].

Day 14: Email 7

Subject: Should I stay or should I go

Hi [Prospect's Name],

Hi there, I've tried to reach you a few times to get you on the phone to talk about your insurance options, but haven't heard back which tells me one of three things:

1. You're all set with your insurance and don't need any help getting the best coverages or making sure you're not over paying.
2. You're still interested but haven't had the time to get back to chat yet.
3. You've fallen and can't get up and in that case let me know and I'll call someone to help you.

Please let me know which one as I'm starting to worry!

Concerned,
[Your Name]