

The Transfer

Our Reps

Hola (agents name), tengo a (prospect names) en la linia para una cotizacion.

The agent

Hola (prospects name), soy (your name), nomas voy a verificar la información para asegurarme que le estamos dando todo los descuentos que califiqué

From here, verify the information as you are doing the quote

- As soon as you pick up the call, you'll be receiving an email with the prospect's information.
- Tip: in case the email is delay, say the following:

The agent

Alparecer, aun no me a llegado la información pero mientas la espero, boy a continuar y le boy a hacer poquitas preguntas mientras me llega la información al systema.

Learn the process for a better transition

The process: Marketleads have created many trusted brands in the Spanish community, generating top-quality prospects in California.

We advertise

Our mission: We want each prospect to have a smooth transition when we send it to you. We set expectations for prospects from the beginning of the call: that we will

Earned their business! Do your best to explain the coverages you are offering them. Based on our reports, most of the prospects don't really know what coverage currently have.

Tips:

1 in 4 people buy within 30 days of quoting them. *

Make sure you set a follow-up process if you don't close them that same day.

A tip that works great:

Got the customer something interested but don't want to buy today?

Ask them when is your next payment with the current carrier, note it, and set a follow-up 5 days before they pay the other insurance, that way is convenient for the prospect, and our data shows that helps to close by 20%.

*This is based on an internal survey to Allstate, State Farm, Farmers and 8 independent brokers in 2021.

