



LEAD FOLLOW-UP TEMPLATES

Text, email, voicemail, appointment and policy follow-up examples

Use only when you have a lawful business reason and appropriate consent. Follow applicable texting/calling rules, DNC requirements, and your agency/carrier compliance guidance.

New Lead - Text

"Hi [First Name], this is [Your Name] with Jennise Housel Agency. I'm following up regarding the insurance information you requested. I'll give you a quick call shortly, or you can text me a good time to connect."

No Answer - Text

"Hi [First Name], I just tried to reach you. This is [Your Name] with Jennise Housel Agency regarding your insurance inquiry. What time today or tomorrow works best for a quick call?"

Appointment Confirmation

"Hi [First Name], confirming our insurance review for [day] at [time]. I'll call you at this number. If anything changes, just reply here."

Missed Appointment

"Hi [First Name], I tried you for our scheduled appointment. No problem if something came up. Would [option 1] or [option 2] work better to reconnect?"

Quote Follow-Up

"Hi [First Name], checking in after the options we reviewed. Do you have any questions about the coverage amount, monthly cost, or how the policy works? I'm happy to clarify anything."

Application Pending

"Hi [First Name], quick update: your application is still being processed by the carrier. If they request anything additional, I'll contact you. I'll keep you posted as soon as there is an update."

Policy Issued

"Great news - your policy has been issued. I'd like to review the key details with you so you know exactly what you have. Are you available [day/time]?"

Client Check-In

"Hi [First Name], this is [Your Name] with Jennise Housel Agency. I'm doing a quick client check-in to make sure your contact and beneficiary information are still current and see whether anything has changed in your coverage needs."

Email - Initial Follow-Up

Subject: Your Insurance Information

Hi [First Name],

I'm [Your Name] with Jennise Housel Agency. I'm following up regarding your request to learn more about insurance options. I'd like to ask a few questions about what you want the coverage to accomplish, your budget, and basic eligibility so I can narrow down appropriate options.

Reply to this email or call/text me at [number] with a good time to connect.

Best,

[Your Name]

Voicemail

"Hi [First Name], this is [Your Name] with Jennise Housel Agency following up regarding insurance information. You can reach me at [number]. Again, this is [Your Name] at [number]."