



CROSS-SELLING **EMAIL TEMPLATES**



CROSS-SELLING

EMAIL TEMPLATES

Identifying and acting on cross-sell opportunities is not only a way for you to increase revenue; it is also a way to provide more value to current clients.

By running reports in your agency management system, you can quickly identify these cross-sell opportunities. But, then comes the tricky part: figuring out what to say and how to deliver the message.

These plain-text templates provide you with emails you can take and use immediately to start cross-selling across your book of business. They're completely customizable, 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 cross-sell lists) can be determined based on several criteria using filters. Learn more about Email Marketing [here](#).

Templates included:

- Group/Employer (general)
- Group Health / Dental and Vision
- Group Health / Life Insurance
- Group Health / Employees Turning 65
- Individual Client (general)
- Individual Client / Child Turning 26
- Individual Client Turning 65
- Medicare Supplement / Prescription Drug Plan
- Medicare Advantage / Hospital Indemnity Plan
- Medicare / Dental Coverage

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
[BusinessName]	Business / Agency 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.

GROUP/EMPLOYER

CROSS-SELL (GENERAL)

Send this email to your group/employer client when you want to let them know about another product or service you offer.

To: Your Group/Employer Client

Subject: I want to provide the most value possible

Hi [IndFirstName],

I hope you're well! I'm reaching out to you today because I enjoy having you as a client, and I want to make sure I'm serving you as well as I can.

Because I want to provide the most value possible, I want to let you know about [product/service] we offer. I think it would greatly benefit your employees because [personal reason].

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[GrpAMFirstName] [GrpAMLastName]
[BusinessName]

How to find opportunities & send: Use AgencyBloc's Email Marketing to search using cross-sell filters, create a single email, and send to all.

But, this message is probably best personalized. Utilize AgencyBloc's Cross-Sell Report first to identify opportunities and then handle them individually.

GROUP HEALTH DENTAL **AND/OR VISION CROSS-SELL**

Send this email to your group/employer client who has health insurance with you, but no benefits like dental or vision.

To: Your Group/Employer Client

Subject: Information on Dental and Vision Benefits

Hi [IndFirstName],

I hope you're well! I'm reaching out to you today because I enjoy having you as a client, and I want to make sure I'm serving you as well as I can.

Because I want to provide the most value possible, I wanted to ask if you currently provide Dental or Vision benefits to your employees? I have some great, [affordable] options I'd love to run by you, if not.

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[GrpAMFirstName] [GrpAMLastName]
[BusinessName]

How to find opportunities & send: Use AgencyBloc's Email Marketing to search using cross-sell filters, create a single email, and send to all.

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GROUP HEALTH

LIFE INSURANCE CROSS-SELL

Send this email to your group/employer client who has health insurance with you, but no life insurance benefits.

To: Your Group/Employer Client

Subject: Information on Life Insurance Benefits

Hi [IndFirstName],

I hope you're well! I'm reaching out to you today because I enjoy having you as a client, and I want to make sure I'm serving you as well as I can.

Because I want to provide the most value possible, I wanted to ask if you currently provide a voluntary and/or paid life insurance benefit to your employees? I have some great, [affordable] options I'd love to run by you, if not.

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[GrpAMFirstName] [GrpAMLastName]
[BusinessName]

Options: Depending on what your client cares about most, you could replace affordable with comprehensive, flexible, highly-rated, or something else you know is relevant to your client.

How to find opportunities & send: Use AgencyBloc's Email Marketing to search using cross-sell filters, create a single email, and send to all.

But, this message is probably best personalized. Utilize AgencyBloc's Cross-Sell Report first to identify opportunities and then handle them individually.

EMPLOYEE OF GROUP/ EMPLOYER TURNING 65

Send this email to the employee(s) of your group client who's turning 65.

To: Your Group Employee Who's Turning 65

Subject: Medicare Information for You

Hi [IndFirstName],

I'm reaching out because your birthday is approaching! I know you currently have health coverage through your employer, [GroupName], but I'm here to help regarding Medicare questions.

I can help you compare the cost of staying on your group's coverage vs. switching to Medicare for your primary insurance. I can also help you ensure you don't miss any deadlines for enrolling in plans or supplements.

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[GrpAMFirstName] [GrpAMLastName]
[BusinessName]

How to find opportunities & send: Use AgencyBloc's Automated Workflow to create a workflow that triggers a few months before the employee's 65th birthday.

GROUP/EMPLOYER WITH EMPLOYEE(S) TURNING 65

Send this email to the employer with employees who are turning 65.

To: Your Group Employer Who Has Employees Turning 65

Subject: Medicare Information for Your Employees

Hi [IndFirstName],

I'm reaching out because it looks like you have an employee [or have employees] nearing 65. I would love to set up a time to come to the office and do a high-level overview of Medicare plans and supplements.

This way, I can help compare the cost of staying on your group's coverage vs. switching to Medicare for their primary insurance. I can also help your employees ensure they don't miss any deadlines for enrolling in plans or supplements.

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[GrpAMFirstName] [GrpAMLastName]
[BusinessName]

How to find opportunities & send: When reaching out to an employer vs. an individual, run a Group Enrollment Census report on your Group Health clients so you can see enrolled employees who are nearing 65. Then, use that list to send this message to the appropriate employers.

INDIVIDUAL CROSS-SELL (GENERAL)

Send this email to your client whenever you want to point out another product or service you offer.

To: Your Individual Client

Subject: I want to provide the most value possible

Hi [IndFirstName],

I hope you're well! I'm reaching out to you today because I enjoy having you as a client, and I want to make sure I'm serving you as well as I can.

Because I want to provide the most value possible, I want to let you know about [product/service] we offer. I think it would greatly benefit you because [personal reason].

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[BusinessName]

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INDIVIDUAL CLIENTS

TURNING 65

Send this email to your client when their 65th birthday is approaching.

To: Your Client Turning 65

Subject: Medicare Information for You

Hi [IndFirstName],

I'm reaching out because your birthday is approaching!

I wanted to get in front of you in ample time before you turn 65 and start the conversation about Medicare.

I would love to help you compare the costs and benefits of different plans and supplements. I can also help you ensure you don't miss any deadlines for enrolling in these plans or supplements.

Do you have time soon to meet or jump on a call to discuss?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[BusinessName]

How to find opportunities & send: Use AgencyBloc's Automated Workflow to create a workflow that triggers a few months before your client's 65th birthday.

MEDICARE SUPPLEMENT / **PRESCRIPTION DRUG PLAN**

Send this email to your clients who have a Medicare Supplement but no Prescription Drug Plan.

To: Your Medicare Supplement Clients Who Don't Have a Prescription Drug Plan
Subject: Prescription Drug Plan Information

Hi [IndFirstName],

I'm reaching out because it looks like you have Medicare Supplement Insurance, but no prescription drug plan yet.

Medicare prescription drug plans (PDPs) help you pay for brand-name and generic drugs. Even if you don't take many prescriptions currently, getting coverage now can protect you from higher costs later.

I would love to talk through the other benefits of prescription drug plans and help you compare plans and costs.

Do you have time soon to meet?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[BusinessName]

How to find opportunities & send: Use AgencyBloc's Email Marketing tool to search using cross-sell filters, create a single email, and send to all.

But, this message is probably best personalized. Utilize AgencyBloc's Cross-Sell Report first to identify opportunities and then handle them individually.

MEDICARE ADVANTAGE / **HOSPITAL INDEMNITY PLAN**

Send this email to your clients who have a Medicare Advantage but no Hospital Indemnity Plan.

To: Your Medicare Advantage Clients Who Don't Have a Hospital Indemnity Plan
Subject: Hospital Indemnity Plan Information

Hi [IndFirstName],

I'm reaching out because it looks like you have Medicare Advantage Insurance, but no hospital indemnity plan yet.

A hospital indemnity plan can help you cover costs incurred by a hospital stay that aren't covered by your Medicare Advantage plan.

I would love to talk through the other benefits of hospital indemnity plans and help you compare plans and costs.

Do you have time soon to meet?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[BusinessName]

How to find opportunities & send: Use AgencyBloc's Email Marketing tool to search using cross-sell filters, create a single email, and send to all.

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MEDICARE / DENTAL

Send this email to your clients who are on Medicare but don't have a Dental plan with you.

To: Your Medicare Clients Who Don't Have a Dental Plan Yet
Subject: Dental Plan Information For You

Hi [IndFirstName],

I'm reaching out because it looks like the Medicare coverage you have does not include routine dental procedures like exams, cleanings, fillings, crowns, or bridges.

If you're interested in dental coverage, I have some great, [affordable] options I'd love to chat with you about.

Do you have time soon to meet?

I look forward to speaking!

[PolAORFirstName] [PolAORLastName]
[BusinessName]

Options: Depending on what your client cares about most, you could replace affordable with comprehensive, flexible, highly-rated, or something else you know is relevant to your client.

How to find opportunities & send: Use AgencyBloc's Email Marketing tool to search using cross-sell filters, create a single email, and send to all.

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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 • 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 - 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

#1 Recommended Insurance Industry Growth Platform

Request a live, one-on-one demo of AgencyBloc. You'll be able to discuss your agency's specific needs and see the AMS in action.

REQUEST LIVE DEMO

“We’ve found the reports to be extremely beneficial in helping us track our book of business. By using the cross-sell report in AgencyBloc, our top two brokers have each been able to grow their life books of business by 20%!”



Mark B.
Thompson-Brooks Insurance