TELESALES APPOINTMENT CONFIRMATION TEXT MESSAGE

Hey [CLIENT NAME], it's [YOUR NAME]. I am just confirming our phone appointment for [DAY AND TIME]. Expect a call around [TIME] from this number.

Here's my:

National Producer Number - [INSERT YOUR NPN HERE]

State License Number - [INSERT YOUR STATE LICENSE NUMBER HERE]

[INSERT YOUR STATE] Insurance License Look Up: [INSERT THE LINK TO YOUR STATE INSURANCE DEPARTMENT]

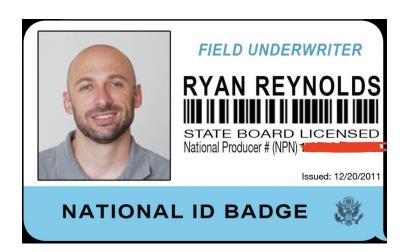
[TAKE A PICTURE OF YOUR STATE LICENSE]

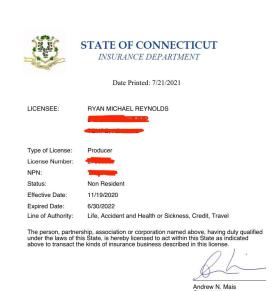
[TAKE A PICTURE OF YOUR ID]

EXAMPLE:

Hey Bob, it's Ryan. I am just confirming our phone appointment today. Expect a call around 3:30pm-4:00pm from this number.

National Producer Number (NPN) - 2222222
CT License Number - 2222222
Connecticut Insurance License Look Up:
https://www.cidverifylicense.ct.gov/CLIC/VerifyLicense.aspx







REASONS TO SEND YOUR CLIENT THAT INFORMATION

- 1. To reduce "no-shows" Send this text the morning of the day the appointment is scheduled.
- 2. To build trust First thing you say on the call, "Did you get a copy of my license? Were you able to verify my credentials? Ok great I'm required to show you that."
- 3. To save you time and increase your efficiency It's not booking them all, it's making sure you only schedule the ones that want it.

