

# CLDP LIVE CALL TRANSFER SCRIPTS

(Recommended you provide a printed copy to anyone responsible for answering Live Call Transfers)



## Best Practices to Understand Before the Call:

### The do's:

- ✓ Do provide a smooth transition that portrays the vendor and agent working as one team
- ✓ when necessary, do bridge the gap between voice transfer and the quote data populating in the Allstate system
- ✓ Do quickly build rapport while asking open-ended questions while using the prospect's answers to drive the selling path

### The don'ts:

- ✓ Don't start the call asking for DOB, DL# or VIN# without first having a rapport building conversation that assesses why the prospect is shopping and what's important to them
- ✓ Don't collect info and ask the prospect to call you back – especially when they do not have your phone number
- ✓ Don't collect info and offer to call the prospect back (unless they ask – in which case please set an appointment time)

## Current Quote

TALK PATH	COMMENTS
<b>Agent:</b> Thank you for calling Allstate. This is _____.	Agency answers call. All CLDP LCT calls come through with a Caller ID of: <b>(847) 262-4800</b>
<b>Transfer Representative:</b> I have _____ on the line and they're looking for more information on an auto quote. Are you ready for the transfer?	Actual vendor verbiage may vary, but this is the essence to expect.
<b>Agent:</b> Absolutely! Go ahead and connect us.	Confirm your readiness
<b>Transfer Representative:</b> Great! Mr/s_____ the agent is on the line. Thank you for your time, I'll leave you in good hands. Hope you both have a great day.	Vendor hands off to agent
<b>Agent:</b> Hello _____, this is _____. You're interested in an auto quote? <ul style="list-style-type: none"> <li>• Who are you currently insured with?</li> <li>• What's your phone # - in case we get disconnected?</li> <li>• What has you shopping for insurance?</li> <li>• What's your last name?</li> <li>• What's your DOB?</li> </ul>	Rapport building + Buys time if there is a lag in the data populating
<b>Agent:</b> It takes a few minutes for your information to come over. Sometimes they get you over quicker than they can send it. <ul style="list-style-type: none"> <li>• How do I spell your last name?</li> <li>• What is your address?</li> </ul>	Use if there is an extended delay in data populating... begin building a quote.

Updated as of 3/30/20

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