Rocket Squad Live Chat

Running successful cross-sale campaigns

Featuring:

Torey Maerz

Rocket Referrals

David Thompson

Foursquare Insurance

Campaign results

78 responses within 24 hours

65 quotes

$42k bound

Auto cross-sell

3 months after effective date

Subject: Bundling insurance saves money (and time).

Hi, [Name],

You can save a lot of money by bundling auto insurance with your current home policy.

Plus, it means you don't have to juggle multiple carriers—all your insurance is in one place.

Please call me at (555) 555-5555 or reply to this email so we can talk about your different coverage options and potential savings.

Looking forward to catching up,

[signature]

Auto cross-sell

35 days prior to renewal

Subject: Let's talk about your coverage

Hi, [Name],

Have we talked about bundling auto insurance with your current home policy?

Give me a call at (555) 555-5555 or reply to this email so we can talk about your different coverage options and potential savings.

Looking forward to catching up,

[signature]

Home cross-sell

3 months after effective date

Subject: Bundling insurance saves money (and time).

Hi, [Name],

You can save a lot of money by bundling home insurance with your current auto policy.

Plus, it means you don't have to juggle multiple carriers—all your insurance is in one place.

Please call me at (555) 555-5555 or reply to this email so we can talk about your different coverage options and potential savings.

Looking forward to catching up,

[signature]

Home cross-sell

35 days prior to renewal

Subject: Let's talk about your coverage

Hi, [Name],

Have we talked about bundling home insurance with your current auto policy?

Give me a call at (555) 555-5555 or reply to this email so we can talk about your different coverage options and potential savings.

Looking forward to catching up,

[signature]

Umbrella cross-sell

Subject: What your home and auto policies may not cover

Hi, [Name],

You might save some money bundling umbrella insurance with your existing policies. Umbrella helps cover things that your home and auto policies won't.

Here's a page with more info on what's covered and what's not.

Call me at (555) 555-5555 or reply to this email and I can help get you taken care of.

Talk soon,

[signature]

Life cross-sell

Subject: [Name], let's talk about life insurance

Hi, [Name],

Hope you are doing well.

As part of my responsibility as your insurance adviser, I would like to offer you're a life insurance quote. The process is super simple, just reply to this email and I will send you a follow-up.

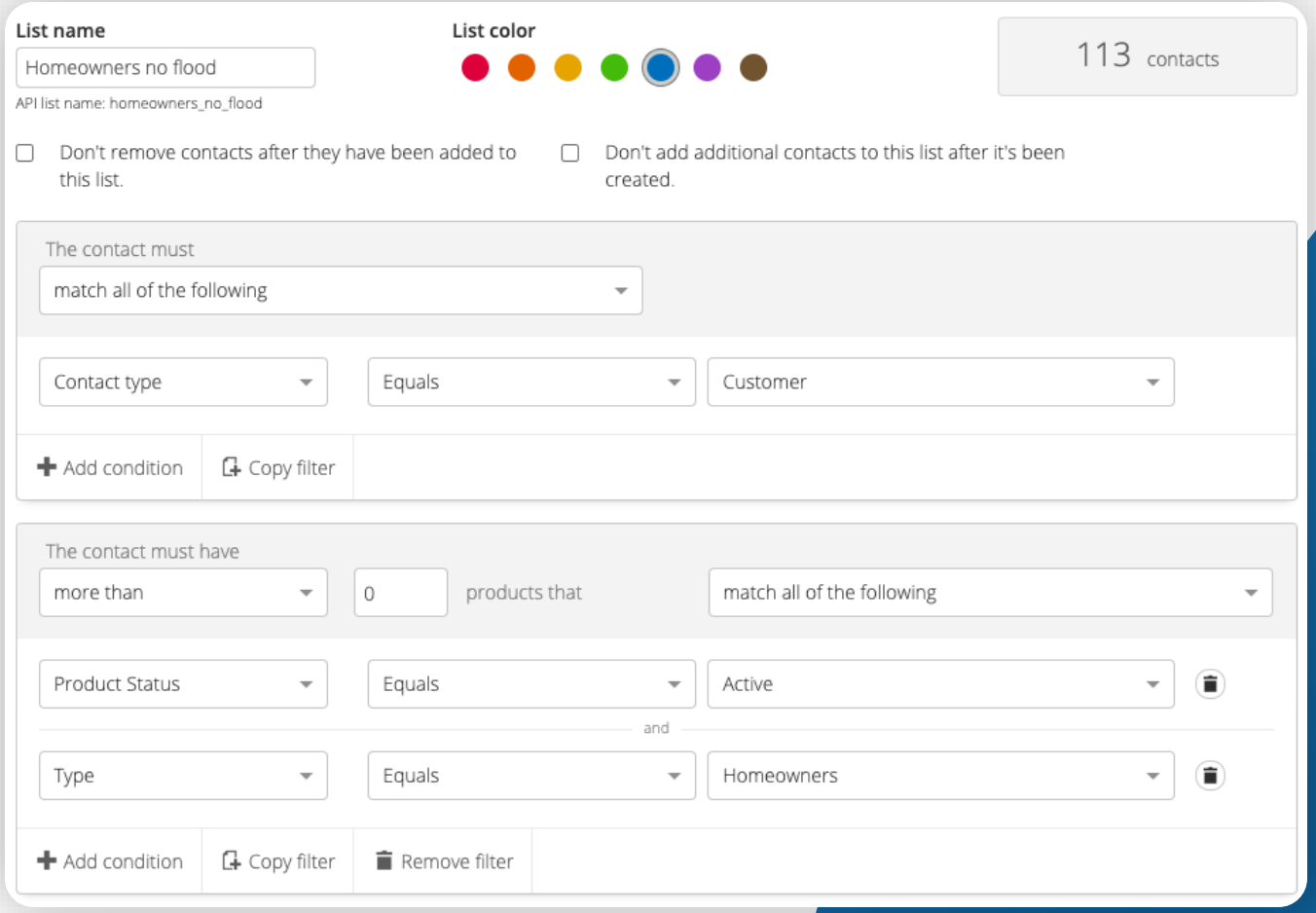
Take care,

[signature]

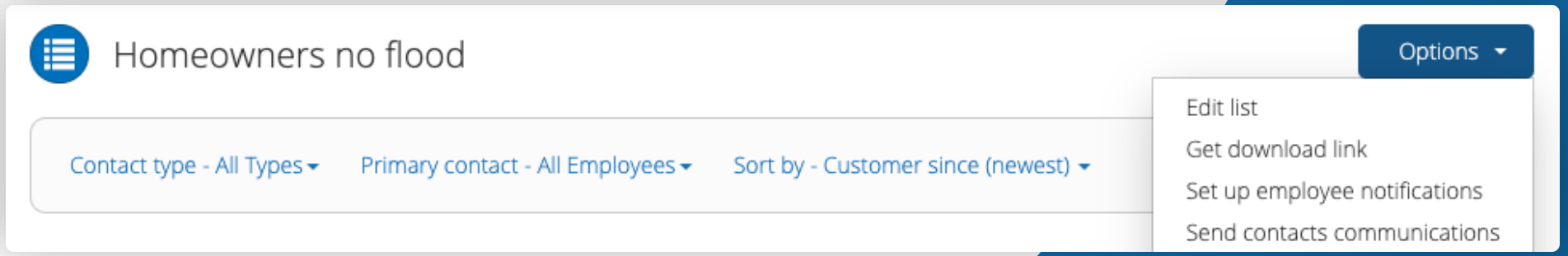
How to get started

1. Create customer segments (contact list)
2. Write and send your message
3. Follow up quickly

Creating a contact list



Write and send your message



Schedule an ad-hoc email

Or automate with our Premium plan

Before you go!

For our customers:

Don’t miss out on our future live chats, join Rocket Squad here:

rocketreferrals.com/join

Not yet a customer?

Interested in automating your cross-selling campaigns? Let us show you how one-on-one!

rocketreferrals.com/demo