



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

List name

Homeowners no flood

API list name: homeowners_no_flood

List color

113 contacts

☐ Don't remove contacts after they have been added to this list.

☐ Don't add additional contacts to this list after it's been created.

The contact must

match all of the following

Contact type

Equals

Customer

+ Add condition

Copy filter

The contact must have

more than

0

products that

match all of the following

Product Status

Equals

Active

and

Type

Equals

Homeowners


+ Add condition

Copy filter

Remove filter



Write and send your message

 Homeowners no flood

Options ▾

Contact type - All Types ▾ Primary contact - All Employees ▾ Sort by - Customer since (newest) ▾

Edit list

Get download link

Set up employee notifications

Send contacts communications

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