

Affinity Networking for Agents

Voicemail Template for Affinity Partner Prospects



Calling potential affinity partners can be effective and a friendly way to introduce yourself. Here's how to craft your phone script to leave a memorable voicemail message.

Before You Call — Have a Plan

Your goal is to build affinity partnerships where both can benefit — and so can your clients! When you call, make sure you know the following things:

- ✓ How you and your potential affinity partner overlap in customer base and shared values (such as: giving back, supporting local resources, etc.)
- ✓ The kinds of collaborative events you can do with this partner (such as: educational meetings, charitable work, potlucks, etc.)
- ✓ What you can offer to your affinity partner's clients that they don't already have (such as: a local guide to health plans, someone to help them understand Medicare, etc.)
- ✓ When you would like to meet in person to talk (know your upcoming schedule)

Your Voicemail Template

Plan to use the script you create as your voicemail message for potential affinity partners. Tailor it to each unique partner — and to your own way of saying things. Let your personality shine through! Practice it enough so that if someone answers, you can still deliver your message with clarity and professionalism.

Voicemail Template



Hi, [potential partner's name]. This is [your name]. I'm a local business owner looking to work with partners like you to help both our organizations benefit. I'm an insurance agent offering [insert your product focus], and I think we'd make great partners because the people we work with have overlapping interests. I'd love to meet up and talk about some of the ideas I have and hear yours, too. Would you prefer to meet during the week or weekend? Give me a call at [your number]. I'm really looking forward to working with you.

After You Call — Follow Up

After you've reached out to your potential affinity partner, there's still more you can do!

- 1 When they call to set a time, know when your calendar is free so you can commit
- 2 Follow up in about a week with another call or an email
- 3 If you don't hear back after a few tries, you can stop by in person, or let them go — if it's not a fit, it's OK!