AGENCY VA

MA COMPLIANCE TRAINING

MODULE 5:

SCRIPTS, TEMPLATES & TOOLS

"SAY IT RIGHT, USE IT RIGHT: TOOLS & LANGUAGE THAT KEEP YOU COMPLIANT"

MODULE 5: SCRIPTS, TEMPLATES & TOOLS

"Say It Right, Use It Right: Tools & Language That Keep You Compliant"

• PURPOSE OF THIS MODULE

This module gives you exact words to say and approved tools to use in your day-to-day work — all aligned with what's legally allowed for unlicensed reps in Massachusetts. Whether you're prospecting, quoting, or servicing, this is your toolkit to stay professional and protected.

• SECTION 1: COMMUNICATION SCRIPTS

Use these scripts verbatim unless instructed otherwise by your agency leadership.

Inbound Phone Call Script – General Intake

"Thank you for calling [Agency Name]. My name is [Your Name]. I assist our licensed team with collecting the information they need to help you. May I get your name and best contact number so a licensed agent can reach out to you?"

Voicemail Follow-Up Script – New Prospect

"Hi [Name], this is [Your Name] with [Agency Name]. I assist our licensed advisors with outreach. We'd love to offer a quick, no-obligation review of your current coverage. You can call us back at [XXX-XXX-XXXX], or reply to this message with a good time for a callback. Thanks!"

Email Script – Quote Intake Confirmation

Subject: Thank You – We've Started Your Quote

Hi [First Name],

Thank you for providing the details to get your quote started. Our licensed team is currently reviewing your info and will reach out soon with your options.
In the meantime, if you have any additional documents (like a prior declarations page), feel free to reply to this email.

Best regards,
[Your Name]
Client Support – [Agency Name]

Email Script – COI Delivery

Subject: Certificate of Insurance Attached

Hi [Name],

Please find attached your Certificate of Insurance for [Project/Venue/Holder Name]. If additional details or special wording are needed, a licensed team member will review and follow up.

Best,
[Your Name]
Policy Service Team – [Agency Name]

Text Message Script – Payment Reminder

Hi [First Name], this is [Your Name] from [Agency Name]. This is a friendly reminder that your insurance payment is due on [Due Date]. You can pay online at [Link] or call us with questions. If you've already paid, thank you and please disregard!

Live Chat/DM Script – Coverage Escalation

Thank you for reaching out! I'm not licensed to provide coverage advice, but I've flagged your message for our licensed agent who will follow up shortly.

Email Script – Cancellation Confirmation (Approved Cases Only)

Subject: Policy Cancellation Confirmation

Hi [Name],

This confirms that your policy with [Carrier] has been cancelled effective [Date]. If you have any questions or need help with a replacement policy, please let us know and we'll have a licensed agent follow up.

Best regards,
[Your Name]
Account Support

SECTION 2: TOOLS YOU SHOULD KNOW & USE

Agency CRM (Customer Relationship Management) System
Examples: AgencyZoom, BetterAgency, HawkSoft, AMS360
Your Role:

- A COI handling flowchart or checklist?
- Pre-written email templates for each servicing task (billing, ID cards, COIs)?
- A "Gray Area Escalation Matrix" that outlines when to escalate?

Rating Platforms & Quoting Tools

Examples: EZLynx, PL Rating, Tarmika, Canopy Connect

Your Role:

- Input client-provided data only (DOBs, VINs, addresses, etc.)
- Never choose coverages or suggest limits
- Upload or organize quote outputs for licensed review

Carrier Portals

Your Role:

- Upload client docs (ID cards, license copies, etc.)
- Download billing schedules, MVRs, or declarations
- Never bind or submit coverage changes

Document Tools

- DocuSign / PandaDoc: Send pre-approved e-signature templates
- Google Drive / Dropbox: Organize uploaded client documents
- PDF Editor: Combine or label COIs, applications, and loss runs

Communication Platforms

- WhatsApp / SMS / RingCentral: Send templated texts
- Gmail / Outlook: Use agency email for all external communications
- Calendly: Set appointments for licensed team members

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PRE-APPROVED TEMPLATES (THAT YOU SHOULD ALWAYS USE)

TEMPLATE TYPE	PURPOSE
Email – New Client Intro	Introduce agency and licensed follow-up
Text – Missed Call	Confirm you received their message and will escalate
Email – Payment Reminder	Alert clients to upcoming or overdue payments (not explaining rate)
COI Template	Standard wording only — no editing
Cancellation Confirmation	Notify of confirmed cancellations post-licensed approval
Intake Form	Gather info without assuming any coverage needs

SECTION 3: COMPLIANCE QUICK-CHECK PROMPTS

Before sending a message or uploading a file, ask yourself:

- Am I making a recommendation of any kind?
- Am I explaining what a policy covers?
- Am I acting as if I'm licensed — even unintentionally?

If yes, stop and escalate.
If no, proceed confidently using templates and approved tools.

KEY TAKEAWAYS

- Always use approved scripts and templates to stay compliant
- Never “wing it” — unclear language can become a legal issue
- Log everything in the CRM and document your activity
- You are empowered to communicate, assist, and escalate — not to sell, advise, or interpret

Would you like me to:

- Deliver this module as a fillable script packet for new hires?
- Format everything as a downloadable template library (Google Docs or PDF)?
- Build a training simulation roleplay exercise with yes/no escalation flags?

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