

## Onboarding | 30 Day Touchpoint

**S: How's it going, {Customer's First Name}**

Hi {Customer First Name},

Has it really been a month already? We hope it's been a smooth and rewarding transition for you, and want to know if there's anything we can do to make your time with us even better.

Please keep us in mind for all of your insurance needs. We offer a wide range of insurance products but if we don't offer what you need then we'll be happy to refer you to someone else who can help.

Thank you again for choosing us for your insurance needs. Feel free to reach out to us with any questions regarding your coverage.

{Agent Name}

{Agent Phone Number}

{Agent Email}

{My Agency Name}

