

Onboarding | Welcome Letter from CSR

S: Welcome to our Agency!

Dear {Customer First Name} ,

My name is {Agent Name} , representing {My Agency Name} . The whole staff and I would like to welcome you to our family. We couldn't be more excited to provide you excellent service and coverage.

As your personal representative, feel free to contact me at any time with your questions or concerns regarding your policy. I can be reached via phone or email during regular business hours.

- Phone: {Agent Phone Number}
- Email: {Agent Email}

Finally, we would like to mention that, as a family run business, your word is key to our success. If a family member or friend may require additional coverage, we always welcome referrals.

{Customer Referral}

Once again, {Customer First Name} , myself and the whole staff would like to welcome you to our family. We look forward to serving your needs to the best of our ability.

{Agent Name}

{My Agency Name}

{Agent Email}

