

Do-It-Yourself Client Cross-Sell



Thank you for your interest in Chubb's client cross-sell programs. We are excited to help you grow your business by providing designed emails that can be sent to shared clients directly from your agency or brokerage email account. The following cross-sell program is designed to put you in touch with clients who might need your help with additional personal lines coverages.

Instructions:

To leverage cross-sell emails available, please use the following instructions.

To copy and paste the email template into a new message:

1. Review information provided on subsequent pages of this document for your selected product type. Click the "Cross-Sell Email" link for the product.
2. From the web browser, click Ctrl + A to select the entire cross-sell email template, then select Ctrl +C to copy the text.
3. Open a new email message using your preferred email service provider (Outlook, Gmail, etc.).
4. In the new email message, click Ctrl + V to paste the email into the message.

To update the template with your agency information:

5. To replace [Agent name], simply select the text, beginning with the bracket, and type your name. Do the same for [Agency name.]
6. Right click on the email address and select "Edit hyperlink." Edit the text to display and "mailto:" your email address.
7. To update the phone number, select the existing phone number (555-555-5555) and type in your phone number.

8. Scroll to the end of the email and select the text that reads "[Insert agency disclaimer and unsubscribe link here]" and link to or paste the agency's disclaimer and unsubscribe link.
9. Please ensure your email communications comply with all applicable laws and regulations. To help with CAN-SPAM compliance, you should:
 - Permit recipients to opt out of future emails from you through the unsubscribe link and honor opt-out requests within ten (10) days of receipt.
 - Make sure to include your postal address in the email disclaimer specific to the agency.
 - Visit the following link for a summary of CAN-SPAM requirements that you may find useful: [CAN-SPAM Act: A Compliance Guide for Business.](#)
10. For compliance purposes, please use the subject line provided for the selected product email.
11. In the Bcc line of the email, enter email addresses of clients who meet target criteria or copy and paste email addresses from an Excel file. DO NOT copy email addresses in the "To:" or "Cc" fields - otherwise, they will be viewable by other clients.
12. Send to agency client list.

Client Cross-Sell Chubb Wine and Spirits

Please reach out to your local Chubb representative with any questions you might have.


With a Chubb Valuable Articles policy, your clients can help protect their wine and spirits, whether they're collecting as an investment, for enjoyment, or both. Either way, with the right policy, if their valuable bottles are broken, damaged, stolen or spoil due to mechanical breakdown or failure, your clients can replace them quickly and without hassle. See below for important cross-sell campaign materials and ideas to help your clients discover what to expect from a Chubb Valuable Articles policy that covers their wine and spirits.

Target Clients:

- Chubb clients who have a homeowner's policy but do not currently have a Valuable Articles policy that covers their wine and spirits.

Wine and Spirits Cross-Sell Campaign Steps:

- **Day 1:** Send initial email to clients, leveraging the following:
 - Email template: [Wine and Spirits Cross-Sell Email](#)
 - Recommended subject line: **It's time to protect your wine and spirits.**
 - Instructions to send on page one of this document.
- **Day 5:** Place a follow-up call to each client. Consider using the general talking points included at the end of this document as well as the following specific to Chubb Valuable Articles Insurance:
 - If no one answers, you can leave a message: Hello, this is [your name] from [your agency]. I wanted to check and make sure you [and your family] are doing okay and to catch up on a couple things. Please give me a call back when you have a minute. My number is [your number]. Thank you
 - If your client answers the phone:
 - Open: Hello, this is [your name] from [your agency], calling to make sure you're doing okay these days and to touch base about a couple things. Do you have a few minutes to talk? [If they say no, ask if there is a better time for you to call back. If they say yes, continue:] How is everything with you these days? [Take time to really listen to how they're doing. See if there is anything they need that you can help them with.]
 - I also wanted to touch base on an email I sent you [earlier this week/last week] about Chubb's Valuable Articles insurance for wine and spirits. I know you have Chubb homeowner's insurance, which will help protect your home and its contents, but may not provide the coverage you need if your wine and spirits were to break, spoil, or get lost or stolen - either at your home, storage facility, or in transit. That's why I wanted to talk to you about the benefits of a Chubb Valuable Articles policy.
 - Even if you're only collecting wine or spirits to drink later, you're smart to make sure those bottles are protected. Chubb's policy will cover you with no deductible, provide worldwide coverage, and protect you even if your bottles break or spoil due to temperature changes caused by the mechanical breakdown or failure.
 - Ask if they're planning to buy wine and/or spirits at auction this fall. If yes: With Chubb Valuable Articles insurance, your new purchases are automatically covered, so you don't have to worry about getting each new bottle on the policy the same day you buy it.



Please reach out to your local Chubb representative with any questions you might have.

- And, most of damage to wine and spirits happens in transit. With Chubb, your bottles are protected in transit from the auction or vendor to your home or storage facility. Chubb can even help you find a transporter with the expertise to handle wine and spirits properly.
- Close: Thank you so much for your time today. Stay safe. [Personal close from what you talked about earlier.]
-
- **Day 14:** Send a second, follow-up email to clients, removing clients who may have responded and leveraging the following:
 - Email template: [Wine and Spirits Follow-up Email](#)
 - Recommended subject line: **Protect your wine and spirits at home, in transit, worldwide.**
 - Instructions to send on page one of this document
- **Day 21:** Consider following up with a call to each client you haven't heard back from. Leverage the talking points included for wine and spirits above.
- **Days 1-21:** Throughout the cross-sell campaign, consider posting related content on your agency's or brokerage's social media accounts, including LinkedIn and Facebook.
 - You can find shareable content at www.chubb.com/agentmarketing, such as [Guide to insuring your wine and spirits](#) and [Why people are collecting wine and spirits](#).

Client Cross-Sell General Talking Points

Please reach out to your local Chubb representative with any questions you might have.

The following are general talking points to keep handy when making calls to and having conversations with clients:

- **If no one answers, leave a message:** Hello, this is [your name] from [your agency], calling to make sure you're doing okay these days and to see if you had a few minutes to catch up about a couple things. Please give me a call back when you have a minute. My number is [your number]. Thank you.
- **If your client answers the phone:** Hello, this is [your name] from [your agency]. I wanted to check and make sure you [and your family] are doing okay and to touch base on a couple things. Do you have a few minutes to talk?
 - If they say no, ask if there is a better time for you to call back.
 - If they say yes, continue: How is everything with you? [Take time to really listen to how they're doing. See if there is anything they need that you can help them with.]
- I also wanted to touch base on an email I sent you [earlier this week/last week] about Chubb insurance. You have Chubb Homeowner's insurance, which protects your house and the things that make it a home. Now, I wanted to talk with you about [Chubb product line] and benefits that other clients have said really make a difference.
- **Close:** Thank you so much for your time today. Stay safe.
[Personal close from what you talked about earlier.]

Chubb. Insured.SM