



Agency Zoom Email Templates with Canopy Connect

Email 1: The Easy Way to Get Better Coverage

Subject: Save Time & Get the Best Coverage – Here's How

Hi, {Nickname},

We know gathering insurance documents can feel like a hassle. But what if you could **securely** share your current policy details in **seconds**—without the back-and-forth emails and paperwork?

Now, you can. We've made it **quick and effortless** to upload your policy details, allowing us to ensure you have the best coverage at the best value.

- ✓ No paperwork
- ✓ No scanning or emailing
- ✓ No endless phone calls
- ✓ Just a few clicks, and you're done!

👉 **Click here to securely import your insurance details now: [INSERT LINK]**

If you have any questions, just reply to this email. We're here to help!

[[Sender Email Signature]]

Email 2: One Simple Step to Secure Your Coverage

Subject: A Faster Way to Get the Coverage You Deserve

Hi, {Nickname},

Just a quick reminder—updating your insurance details has **never been easier!**

Instead of searching for documents or playing email tag, you can now **securely** submit your policy info in just a few clicks. This helps us:

- ✓ Ensure you have the right coverage
- ✓ Find potential gaps that could cost you
- ✓ Get you the best protection possible

It's fast, safe, and takes less than a minute.

👉 **Click here to upload your details now: [INSERT LINK]**

Still have questions? Just hit "Reply" and let me know how I can help!

[[Sender Email Signature]]

Email 3: The Fastest Way to Lock in the Best Coverage

Subject: The Fastest Way to Get the Right Coverage

Hi, {Nickname},

In order to **secure the best coverage for you—fast**, we just need one quick thing: **your current policy details**.

This allows us to:

- ✓ Compare your current coverage and find any gaps
- ✓ Ensure you're not overpaying for protection
- ✓ Get your policy secured quickly, without unnecessary delays

The fastest and most secure way to submit this is right here: **[INSERT LINK]**

Once you've completed this step, I can move forward immediately to find the best coverage options for you. If you have any questions, just reply to this email—I'm happy to help!

Looking forward to getting this done for you!

[[Sender Email Signature]]

SMS 1 (after quote request)

🚀 Skip the paperwork! Upload your policy details in seconds & get the best coverage—fast. Click here: **[INSERT LINK]**

SMS 2 (follow-up reminder)

Still need your policy details! No scanning, no hassle—just a few clicks to secure the best coverage. Do it now: **[INSERT LINK]**

SMS 3 (last nudge)

Last step to lock in your best coverage! Upload your policy details now & we'll handle the rest.
Takes 60 seconds: [\[INSERT LINK\]](#)