

New Agent Phone Script

(CLIENT NAME)?

Hi _____ my name is (your name), I am giving you a call in regard to the request that was sent into for more information on the state regulated life insurance programs. It looks like you listed your age and DOB as _____. Is that correct?

PERFECT! I am the medical field underwriter assigned to you to see exactly which programs you qualify for.

It looks like they have me dispatched in your area for the next two days. Are you working, retired, disabled or unemployed?

If working: "Awesome, and what does your typical work schedule look like? Ok Perfect, so you should be home around _____ time, correct?"

If not working: skip to family obligations/appointments.

"Do you have any family obligations or doctors' appointments coming up tomorrow or the following day? Perfect.

Now _____, are you more of a morning person or are you like me and you like to sleep in a little? - Perfect.

Our appointments will usually take about 10-15 minutes, and it looks like I could squeeze you in between _____ and _____ time. Does that work for you?

Okay Great. It looks like when you sent in the request you listed your address as _____. Is that still current?

Okay perfect. Is that a single-family home, mobile home or apartment complex? Awesome, any gate codes I need to be aware of to get into the neighborhood?

(CLIENT NAME) how do you usually keep track of your appointments? Awesome, will you grab a pen and paper or add me into you calendar? My name is _____ our appointment is (DATE) between (TIME FRAME). I am also going to give you a confirmation code; this code is also going to be my National Producer Insurance number so you can feel free to look me up on the department of insurance website prior to our appointment. That number is _____. Can you repeat that back to me?

Awesome! I just ask that you give me an extra 15 minutes on either side of the appointment as I try to help 15 + families per day and I can be running early or late depending on my previous appointments.

Just so you know I will be driving a (VEHICLE MAKE AND MODEL) and I am (Describe yourself example tall with brown hair). So, if you see me coming you can hide the shotguns and attack dogs.

Okay (CLIENT NAME), I added you to my schedule. I look forward to seeing if I can help you out.