

Phone Script #1 - Marissa Mazziotti

(Client name)?

Hey (client name), I'm actually just giving you a call back about the request you sent into my office. Looks like you were looking for info on state regulated life insurance programs. (client name), it's just my job to verify some info here. It looks like you put your birthday as _____ and your address as _____. Is that correct?

Perfect.

(client name), most people that fill this out and send it in want to make sure they don't leave their family with any financial burden if they pass away, God forbid. I'm assuming that's what you were looking for, right?

Great.

And who is that person that you would need to leave money to, to take care of those things?

Perfect. And you filled this out for just you or your spouse as well?

Well _____, I'm glad you put this request in now because this is the LAST time they are going to offer these programs on a non-medical basis with everything that's been going on. That means no doctors or needles. They just send me out there to verify your identity and make sure you're not someone who just escaped from prison or anything, does that sound fair?

Great.

The reason I'm calling you is because they have me dispatched out in your area the next two days. As you can imagine, we are getting thousands of these requests a week so I'm really busy dropping the info off to about 15 families a day. I can't stay long but I do need to come drop this off and let you know what you qualify for.

Are you typically home all day or still working?

Great. Like I said, I am pretty booked up but I can squeeze you in at _____ or _____ (time). Which of those is better for you?

Perfect, I'll put you down. Give me a little buffer time as I will be coming from an appointment before yours and I could be 10-15 mins within that window.

*Grab Pen & Paper for me (Name, phone number, license #, appt. time/date) *House color? Gate code? Any big dogs

(THEY NEED TO IMAGINE YOU COMING OVER).

Great, see you then _____. I look forward to helping you out.