

Phone Script #1 – Betty-Jo S.

Aged Internet Leads

Hello (client name)?

Hey, this is (your name) and I'm a licensed underwriter in (their county) by the department of financial regulation in (state). Now a couple months back you sent in an inquiry requesting information on life insurance programs. Did you happen to get the packet with the state regulated options?

I apologize for that (their name) I'm going to get you off the phone in 30 seconds here, I just gotta verify your information:

I have your date of birth as _____, that's you correct?

Awesome and _____(listed address) is that a current or old address?

Are you working, retired or disabled?

Are you a smoker or a non-smoker?

Ok perfect – they have me dispatched in your area on (days) would _____ or _____ time work best for you?

Do you live in a home or an apartment? Is the number on the house or mailbox?

What color is your house? Are there any gate codes or dogs that I need to be aware of?
(Perfect)

Now _____, I am seeing about 40 families in your area the next two days, is there any reasons that you will not be home at this time?

I use this below if I feel that the client needs a push to make the appointment.

Okay, now every person I speak to that filled out this request usually already has a name in mind to who they want the death benefit to go to. That being said (client name) **who would your beneficiary be?**

Perfect, so I'm kind of playing catch up here because I've been super behind due to the number of requests that we have received. I personally delivered information just like this to about 40 families this week. What time are you typically walking through your door at home after work?

Okay what I can do for you is give you the (time) time slot or (time), which would you prefer?

Please just give me a little bit of grace on that time because I have about 15 appointments booked that day, so I'll be there between 2 and 3, okay?

(If they have a spouse, make sure they are both home)

Cement Appointment

1. Ask them to get a piece of paper and pen—provide your information

- (Name, License Number and what you are driving)

2. Ask them to write down the appointment as well.

3. Okay, I will see you tomorrow between ____ & ____ , look forward to helping you and your family!