



Follow Up List – Appointment Setting Script

Hi, is this Client First Name? Hi Client this is Your Name and I'm the Senior Benefit Coordinator here in City. I'm licensed by the state of _____ and was appointed to help you out. The reason I'm calling is because a little while back you received a card in the mail regarding some of our new state regulated final expense programs for fixed income families/seniors. *(Go straight into confirming their address)*

I have you here at _____ (address) Is that Correct? Do you remember seeing this card/letter in the mail? Ohhhhhhhh you don't remember? (create urgency in your VOICE!) That's ok Client Name, a lot of the families that we assist get tons of stuff being sent in the mail where it can be a bit overwhelming (chuckle)..... I'm actually going to be in your area today and tomorrow seeing some other families in your community. It only takes 5-7 minutes. What would be the best time I can drop this off and get you this new information?

Got it. And we have your age listed down as XX, is that correct?

Before I let you go, would you like to receive information on \$5,000 of coverage? \$10,000 of coverage? Or \$20,000?

And who would your beneficiary normally be for something like this? Spouse, son, daughter, brother?

Great, well Client, I've got you down for Day/Time and will swing on by, make sure you've got this new information in your hands and hopefully be able to help you out.

Summary:

SHORT AND SWEET! AND **NEVER PAUSE!** If they start asking questions, revert back to the beginning of the script or use the 2 rebuttals below that pertain to that call. Repetition can be powerful!

Programs... is a marketing term for clients because they don't want to hear the word "Life Insurance", Insurance.... any kind of Insurance!!

TONALITY, TONALITY, TONALITY! It's not what you say but how you say it. If you are having a bad day, make sure you snap out of it when you make calls. Your clients can sense and feel your mood. We want to be upbeat and smiling. These are the little things that make us more effective. Use this script and add your spin to it where it becomes YOURS!! Making a client laugh is a great way to increase your chances.

Objections: What is this about again?

Answer: a little while back you received a card in the mail regarding some of our new state regulated final expense programs for fixed income families/seniors but our records don't show that you've responded as of yet and we're just calling to make sure that you get this new information in your hands. **(Immediately go back to where you left off on the script. Don't pause!)**

What is this about (#2)? This is the new burial program designed for Veterans and families/seniors. These programs are typically designed for those who are on a fixed income, retirement, or on disability. **(Immediately go back to where you left off on the script. Don't pause!)**

Objections: I already Have Insurance

Perfect!! This program works in conjunction with your other life insurance and that's why you were notified about this program. **(Go right back where you left off on the script. Don't pause!)**