

Appointment Setting Script

When calling to pre-set appointments you want to keep it short and quick but effective.

The script should be followed to the letter. It is important that all phrasing and prepositions be kept the same as what is written below.

I always like to call in the 3rd person.

() are sections where you input your response or situation < > are for notes on why it is important or how it should be handled.

<Ask for the person by FIRST NAME. The names are very important to get the right pronunciation the first time. Take a second before you call the lead and get the name pronounced correctly. If you mispronounce someone's name they immediately assume you are a telemarketer and are on the defense immediately>

<TV or Facebook> Hi (FIRST NAME), this is (YOUR NAME) calling from Senior Life Insurance Company. You just recently requested information by (calling off our TV Commercial, or responded to our FaceBook ad). When you did that were you wanting this information for yourself or a loved one?

<Direct Mail> Hi (FIRST NAME), this is (YOUR NAME) calling from Senior Benefits. You just recently requested information by (responded to one of our post cards in the mail). When you did that were you wanting this information for yourself or a loved one?

<Let them answer. Do not ask if they remember or anything like that. The purpose of asking them if they want the information for themselves or a loved one forces them to answer in a way that you need. It doesn't allow for anything other than themselves or a loved one>

Great, (YOUR NAME), who is one of our final expense specialist, is available to go over your options and answer any questions that you may have. What would be a good time (YOUR NAME) to contact you and deliver that information? Morning, afternoon or evenings?

<Set a time>

Are you still located at (ADDRESS)? *<If no, ask for the correct address>*

And you are (Age), year young? *<If no age, ask for the age>*

And, again this information will be just for you or for a loved one as well?

Thank you very much for your time and again, Final Expense Specialist (YOUR NAME) will see you (APPOINTMENT TIME). Take care and have a great rest of your day.

Good Bye.