



Follow Up List - Appointment Setting Script

Hi is this Client First Name?

Hi Name, this is Your Name with Senior Benefits. The reason I'm calling is that you may qualify for the new state approved final expense plan that's now available in Client's City. Did we get this new information to you yet?

Ok..and you are still out there on Street Name in City, correct? Ok... well I'm going to be servicing your area this week and I what I'd love to do is make sure you get this new information in your hands....*I'm assuming that's ok, right?!*

Client, what's generally the best day this week to catch you for about 5 minutes?
And is it better to catch you in the morning, afternoon or in the evening?
(*Perfect. And when you say afternoon, is that more like between 1-2 or more like 3-4?*)

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!**)