

ZOOM MEETING

INTRODUCTION

Client answers: (Client name)?.... Hey (Client name) this is _____, with the Benefits Office right here in (County). I was just getting back to you about that form you had filled in online about the state regulated final expense programs. It's where you put your birthday as _____. That's you, right?

Perfect, (Client name) I'm just the field underwriter assigned to get the information to you and see what coverage you'd be eligible for. They used to send me out there for 10-15 minutes to see if we can help you out. Now, with everything that is going on, they allow us to see you by zoom. Do you know how to use zoom?

FIGURE OUT THEIR SCHEDULE

(Client name) are you working disabled or retired?

- If working: What time do you typically get off of work?
- If retired or disabled: Do you have any doctor's appointments on (enter day)?

Ok and are you married or single?

- If married: And are they currently working, retired or on disability?

TELL THEM THE TIME YOU ARE MEETING ON ZOOM.

Ok, I have about 10 other families I need to see (enter day), I already have a (enter time) booked, but what I'll do is squeeze you in for a (enter time) for about 10-15 minutes to get this information back to you.

TIE DOWN THE APPOINTMENT – GET THEM TO VISUALIZE YOU MEETING ON ZOOM.

_____, I am going to give you a little homework because I want you to be comfortable with me. What is your email address where I can send you my information? When we do this application for coverage, the carrier will ask all the things you would expect a company to ask in exchange for promising thousands of dollars for your family. Please make sure you have your checkbook or at least account number, your driver's license, and you know your social security number by heart, right?

You have a good working computer?

Is Zoom already loaded on the computer?

Please make sure the computer is on for at least an hour before our meeting so it is ready to go.

Are you good at keeping appointments? Me too. See you on (enter day) between (enter time) and (enter time).