

## PHONE TIPS

### **DIAL DAY PREP**

- Download Sideline App. Make all your calls from this number
  - Never answer a phone call from this number. You ONLY answer calls from clients. Until they're your client, don't answer
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- Have all your leads printed out the night before and organized. Organize them by city
- Have ~ 70 leads to go through per dial day

### **DIAL DAY**

- Be on Zoom Dial Session, making your first phone call at 8a. Every Monday and Thursday
- Dial each lead 3x in a row. Go through your whole stack of leads, and then rinse & repeat until you have your appointments booked.
- Sound pissed off when you get them on the phone. NEVER sound excited. You'll sound like a telemarketer.
- Keep track of dial tracker. Keep list of all objections on back of dial tracker
- You should be able to make ~50 calls / hr. So if you're dialing for 8 hours, you should make 400 calls. MAKE THIS YOUR JOB FOR DIAL DAY

### **WHEN / WHAT TO TEXT A LEAD**

- Only after you've dialed the lead 10x in a day
- Message:
  - "Hey Bob, this is the Benefits Office right here in (County). We received the request for the life insurance information you filled out online. It takes about 10 minutes to see if you are eligible. We have an underwriter available tomorrow at 7a or 5p. Which works best?"
- If you have a Facebook Final Expense Lead or a Mortgage Protection Lead, send the lead card with it.

### **WHEN TO LEAVE VOICEMAILS**

Never