

Use a tone as if you are the expert, because you are. Level tone, professional.

LIFE INSURANCE

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 life insurance 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 just send me out there for 10-15 minutes to see if we can help you out.

Are you still at (address)?

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 doctors appointments on (enter day)?

Ok and are you married or single?

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

TELL THEM YOU'RE COMING OVER

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 put you down 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 COMING OVER

The (enter street address), what color is the house?

And will the numbers be on the driveway or the front door?

Great, can you do me a favor and grab a pen and paper so you can take down my information?

- Provide:
 - Name
 - Appointment date & time. Give an hour window. So if they appointment is at 9a, say I'll be there between 830-930a
 - Confirmation Code. Mine is CT21 (make one up, sounds more official)

Awesome. I'll be driving a (enter car type) so when you see that pull up, you know you have the right person. One last thing, _____ are you good at keeping appointments? Me too. See you on (enter day) between (enter time) and (enter time).