

PHONE SCRIPT-with directives just for your info

Read this one but use the one without directives for smoother flow

(RELAX, be conversational, not robotic, get them to laugh as you proceed through it and let it take on your personality.)

Hi _____. This is _____ and the reason I'm calling is either you or perhaps your ____ (spouse) returned a form you filled out requesting more information about mortgage protection and I just need to verify some of this info so I can get that together for you. *(DON'T PAUSE)*

(BONUS LEADS of 4A and down-say: as our records indicate you haven't gotten your coverage yet so your case has been assigned to me.)

It says here your mortgage is \$ _____. Is that a 15 or 30 year note? *(Pause)*

About how much is that payment? *(This is a good question to ask for Critical Period but just FYI)*

(You can mix these questions up so you don't sound too scripted, do both husband and wife at the same time or do one then the next.)

Have you folks used any nicotine or tobacco products in the last twelve months?

_____ 's birthday is listed as _____ and yours is _____. What is your height and weight? *(Then something funny like: "is your wife within ear shot?")* How much does _____ weigh and what is his/her height?

What do you do for a living? And _____ (spouse)? *(Can say something like: "Oh my gosh, when are you guys ever home together", which will help you know that for setting the appointment later.)*

Do you have anything in your background like cancer, stroke, diabetes, heart attack, high blood pressure, COPD, any liver or kidney issues or any surgeries? How about _____ (spouse)?

Are you on any prescription medications at all? Is _____ (spouse)?

Have you been taken off any in the last couple of years? Has _____ (spouse)?

Now let me explain to you what I do. I represent about 20-30 different companies and I will go out in the marketplace and act as your advocate. I'll put together about 15-20 different options and then select the best 3 or 4 of those for you. Then I'll go over your options which only takes 15-20 minutes and we'll go from there. When are you both usually home together: morning, afternoon or evening? Great! I'll be in your area on _____ at _____ and _____ at _____. Which one works better?

(Set the appointment.)

Give me about 30 minutes on either side of that because it can get a little hectic with traffic and such and sometimes I can even be a bit earlier than expected.

(Tie Downs-pick a couple)

Where will I find your house numbers?

Are there any specific landmarks I should look for?

Any cars in the driveway?

OK, GPS should get me there, but you've given me helpful things to find you and I'll be driving a_____.

Now, the hardest part of my job is when I spend the time putting this together for someone and drive out to their place and they forget about me. You're not going to forget about me, are you?

If you can grab a pencil and paper I want to give you some information real quick. If an emergency happens and you need to contact me, my name is _____ and my direct line is_____. This is your case number_____.

I'm really looking forward to seeing you on _____at_____!