Appointment Type Sales Scripts

LEAD TYPES & PRACTICE GUIDE

1 Mortgage Protection

DIRECT MAIL - CALL IN - INTERNET

This script equips agents to set appointments with clients interested in mortgage protection, focusing on life insurance for unforeseen circumstances.

2 Final Expense

DIRECT MAIL - INTERNET

This script aids agents in arranging appointments with clients interested in final expense insurance, emphasizing coverage for end-of-life expenses.

3 Current Client - C.A.R.E.

BIRTHDAY - POLICY REVIEW - ORPHAN

This script guides agents in scheduling reviews with existing clients to discuss current coverage and explore new insurance options, emphasizing the importance of updated policies for comprehensive protection.

4 Internet Request

INTERNET

This script supports agents in responding to internet inquiries from potential clients exploring various life insurance options, including term and whole policies, facilitating discussions to identify the best coverage solutions for their needs.

5 Emergency Contact System

CLIENT GIVEN

This script enables agents to explain the Emergency Contact System (ECS) to the network selected by the client, focusing on the role and importance of each member in ensuring prompt claim processing and support during critical times.

6 Referrals

CLIENT GIVEN

This script guides agents in making calls to client referrals, providing a structured approach for introducing their services and establishing a connection based on the referring client's recommendation

7 Policy Conservation

CURRENT CLIENT

"This script is tailored for agents to capitalize on policy conservation opportunities, providing a structured approach to engage clients in reviewing and retaining their existing insurance policies.

8 Warm Market "Practice"

WARM MARKET

This script is crafted for agents to practice their sales process within their warm market, offering guidance on effectively presenting insurance products and refining their approach in a familiar and supportive environment.

LEGACY PARTNERS
FINANCIAL NETWORK

LEGACY PARTNERS

Mortgage Protection

DIRECT MAIL - CALL IN - INTERNET
AS APPOINTMENT SETTER

Hey, (clients name)?!? (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (your name). I am calling about the loan with (bank name) in the amount of (mortgage amount).

I got that request you sent showing a concern that, God forbid, there was an unexpected death or disability, the loan would be covered.

(Agent's name) will be in your area on (DAY) and (DAY); (he/she) can give you 10 to 15 minutes to get you the information.

So for (DAY), I have a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

If you don't mind me asking, is there a spouse or significant other involved?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

BONUS PRO TIP: If you already know the answer ok to click "Yes" or "No".

Great!

Mortgage Protection

DIRECT MAIL - CALL IN - INTERNET
AS APPOINTMENT SETTER

Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be.

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down (agent's name), its (agent's name), you spell that... (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME

That's right. Also, if you can, note that (he/she) could be 10-15 minutes early or late, depending on other appointments and traffic, but (he/she) should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

Awesome, now I have you over here at (client address) in (city). Is that correct?

PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Mortgage Protection

DIRECT MAIL - CALL IN - INTERNET
AS AGENT

Hey, (clients name)?!? (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (your name). I am calling about the loan with (bank name) in the amount of (mortgage amount).

I got that request you sent showing a concern that, God forbid, there was an unexpected death or disability, the loan would be covered.

I will be in your area on (DAY) and (DAY); I can give you 10 to 15 minutes to get you the information.

So for (DAY), I have a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

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LEGACY PARTNERS

Mortgage Protection
DIRECT MAIL - CALL IN - INTERNET
AS AGENT

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That's all I have for you right now, I look forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

LEGACY PARTNERS

Final Expense

DIRECT MAIL - INTERNET
AS APPOINTMENT SETTER

Hey, (clients name)?!? (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (your name). I am calling about the Final Expense request you sent showing a concern that, God forbid, there was an unexpected death or disability.

(Agent's name) will be in your area on (DAY) and (DAY); (he/she) can give you 10 to 15 minutes to get you the information.

So for (DAY), I have a (TIME) or (TIME). Which one is better?

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That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Final Expense

DIRECT MAIL - INTERNET
AS AGENT

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I will be in your area on (DAY) and (DAY); I can give you 10 to 15 minutes to get you the information.

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LEGACY PARTNERS

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LEGACY PARTNERS

Current Client - C.A.R.E.

BIRTHDAY - POLICY REVIEW - ORPHAN
AS APPPOINTMENT SETTER

Hello, (client's name)!?! (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

My name is (appointment setter's name) and I'm calling from your life insurance agent's office. This is regarding your (company name) policy, does that ring a bell?

Okay. Well, I am giving you a call today because your policy is popping up for that required review, and I was checking to see what time in the next couple days that works for you to review that policy.

By the way, this review will be over the phone and shouldn't take more than 15 minutes. Which works better for you tomorrow, morning or afternoon or evening (only pick 2, not all 3).

So for (DAY), I have a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

Quick question... if you don't mind me asking, is there a spouse involved also?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

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Great!

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BIRTHDAY - POLICY REVIEW - ORPHAN
AS APPPOINTMENT SETTER

Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be

Now, what was your spouse's name so I can look for that policy also? Did they take out their policy at the same time? Was it with the same company? To make this process go a lot quicker, when the agent calls, make sure you have your policies out.

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

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AS AGENT

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That's all I have for you right now, I looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Internet Request

INTERNET
AS APPPOINTMENT SETTER

Hey, (clients name)?!? (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (your name). I got that request you sent showing a concern that, God forbid, there was an unexpected death or disability.

(Agent's name) will be in your area on (DAY) and (DAY); (he/she) can give you 10 to 15 minutes to get you the information.

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Awesome, now I have you over here at (client address). Is that correct?

PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

LEGACY PARTNERS

Internet Request

INTERNET
AS AGENT

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PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, I look forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Emergency Contact System

CLIENT GIVEN
AS APPPOINTMENT SETTER

Hey, (ECS's name)?!? (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (appointment setter's name). Recently, (agent's name) helped your (relationship with the client) (client's name) put together a little life insurance policy so that, God forbid, when something happens, they can leave some money behind for the family.

The reason for the call today is that we put together something called an emergency contact list. What that means (ECS's name) is I would like you to save the agent's name and phone number so that when the day comes, and something happens to (client name), you can call the agent and let them know so that they can get the money to their family as quickly as possible. Is that ok with you?

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down (agent's name), its (agent's name), you spell that... (spell it out from them so they can write it down). And their phone number is xxx-xxx-xxxx.

(ECS's name) we work for 20 different companies, so we were able to shop through and find the best benefits and best price for (client's name), and the best option for them was (company you helped them with). So you can write down (company you helped them with) (help them spell it).

Okay (ECS's name), thank you so much for doing that, and make sure that you save that to your phone as soon as you get off, just in case you lose that piece of paper.

Emergency Contact System

CLIENT GIVEN
AS APPOINTMENT SETTER

(ECS's name), as the agent was leaving, there were a few people on this list that (client's name) cared about that they thought could benefit from the information given to them, and they mentioned you! (Agent's name) will be in your area on (DAY) and (DAY); (he/she) can give you 10 to 15 minutes to get you the information.

So for (DAY), I have a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

.BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

And what's your address?

If you don't mind me asking, is there a spouse or significant other involved?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

BONUS PRO TIP: If you already know the answer ok to click "Yes" or "No".

Great!

Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be.

Okay, can you write down the agent's name, its (agent's name), you spell that... (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME.

Emergency Contact System

CLIENT GIVEN
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That's right. Also, if you can, note that (agent's name) could be 10-15 minutes early or late, depending on other appointments and traffic, but I should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

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Emergency Contact System

CLIENT GIVEN
AS AGENT

Hey, (ECS's name)?!? (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (your name). I recently helped your (relationship with the client) (client's name) put together a little life insurance policy so that, God forbid, when something happens, they can leave some money behind for the family.

The reason for the call today is that we put together something called an emergency contact list. What that means (ECS's name) is I would like you to save the agent's name and agent's phone number into your cell phone so that when the day comes, and something happens to (client name), you can call the agent and let them know so that they can get the money to their family as quickly as possible. Is that ok with you?

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down my name, its (your name), you spell that… (spell it out from them so they can write it down). And their phone number is xxx-xxx-xxxx.

(ECS's name) we work for 20 different companies, so we were able to shop through and find the best benefits and best price for (client's name), and the best option for them was (company you helped them with). So you can write down (company you helped them with) (help them spell it).

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LEGACY PARTNERS

Emergency Contact System

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If you don't mind me asking, is there a spouse or significant other involved?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

BONUS PRO TIP: If you already know the answer ok to click "Yes" or "No".

Great!

Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be.

Okay, can you write down that information as well. That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME.

Emergency Contact System

CLIENT GIVEN
AS AGENT

That's right. Also, if you can, note that I could be 10-15 minutes early or late, depending on other appointments and traffic, but I should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

LEGACY PARTNERS

Referral

CLIENT GIVEN
AS APPPOINTMENT SETTER

Hello, (client's name)!?! (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (appointment setter's name) from (insurance company). Is this a good time for a quick chat?

Great!

I'm following up on a conversation you might have had with (client's name), one of our valued clients. (client's name) recently set up a life insurance policy with us and thought it would benefit you to explore your options as well. Have you had a chance to talk with (client's name) about this?

Excellent, I'm glad to hear that. As (client's name) might have mentioned, our goal is to offer personalized advice and life insurance solutions that align with individual lifestyles and needs.

Agent (agent's name) will be in your area on (DAY) and (DAY); he/she can give you 10 to 15 minutes to get you the information.

So for (DAY), I have a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

Quick question... if you don't mind me asking, is there a spouse involved also?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

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Referral

CLIENT GIVEN
AS APPPOINTMENT SETTER

Great!

Would that be a good time for them as well?

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Now, what was your spouse's name so I can look for that policy also? Did they take out their policy at the same time? Was it with the same company? To make this process go a lot quicker, when the agent calls, make sure you have your policies out.

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down the agent's name, its (agent's name), you spell that... (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME

That's right. Also, if you can, note that (he/she) could be 10-15 minutes early or late, depending on other appointments and traffic, but (he/she) should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Referral

CLIENT GIVEN
AS AGENT

Hello, (client's name)!?! (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (agent's name) from (insurance company). Is this a good time for a quick chat?
Great!

I'm following up on a conversation you might have had with (client's name), one of our valued clients. (client's name) recently set up a life insurance policy with us and thought it would benefit you to explore your options as well. Have you had a chance to talk with (client's name) about this?

Excellent, I'm glad to hear that. As (client's name) might have mentioned, my goal is to offer personalized advice and life insurance solutions that align with individual lifestyles and needs.

I will be in your area on (DAY) and (DAY); I can give you 10 to 15 minutes to get you the information.
So for (DAY), I have a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

Quick question... if you don't mind me asking, is there a spouse involved also?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

BONUS PRO TIP: If you already know the answer ok to click "Yes" or "No".

1

Referral

CLIENT GIVEN
AS AGENT

Great!

Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be

Now, what was your spouse's name so I can look for that policy also? Did they take out their policy at the same time? Was it with the same company? To make this process go a lot quicker, when the agent calls, make sure you have your policies out.

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down my name, its (your name), you spell that… (spell it out from them so they can write it down). That was (DAY) at, ….. shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME

That's right. Also, if you can, note that I could be 10-15 minutes early or late, depending on other appointments and traffic, but I should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

That's all I have for you right now, I looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

LEGACY PARTNERS

Policy Conservation

CURRENT CLIENT
AS STAFF MEMBER

Hello, (client's name)!?! (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (appointment setter's name) calling from (insurance company).

I'm calling regarding your life insurance policy with us. I wanted to inform you that your policy is currently not in force. I'm here to assist you with this and explore options to ensure you continue to have the coverage you need.

I understand that circumstances can change, and I'm here to help. First of all, I'd like to check if there were any specific reasons for the lapse, such as budget constraints or changes in your life that caused this lapse.

Thank you for sharing that with me. It's important for us to understand your situation so we can offer the best possible solutions. I want to let you know that we have a grace period available, which allows you to reinstate your policy without any penalties and redraft the amount.

Additionally, if your current policy strains your budget, we can explore more affordable options. Our goal is to provide you with coverage that meets your needs and financial capacity. Would you be interested in discussing these alternatives, or should we just redraft the premium?

Great! Agent (agent's name) will be in your area on (DAY) and (DAY); (agent's name) can give you 10 to 15 minutes to get you the information.

So for (DAY), (agent's name) has a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

LEGACY PARTNERS

Policy Conservation

CURRENT CLIENT
AS STAFF MEMBER

BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

If you don't mind me asking, is there a spouse or significant other involved?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

BONUS PRO TIP: If you already know the answer ok to click "Yes" or "No".

Great!

Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be.

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down the agent's name, its (agent's name), you spell that… (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME.

That's right. Also, if you can, note that (agent's name) could be 10-15 minutes early or late, depending on other appointments and traffic, but I should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

Policy Conservation

CURRENT CLIENT
AS STAFF MEMBER

That's right. Also, if you can, note that (agent's name) could be 10-15 minutes early or late, depending on other appointments and traffic, but (he/she) should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

Awesome, now I have you over here at (client address). Is that correct?

PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, I look forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

LEGACY PARTNERS

Policy Conservation

CURRENT CLIENT
AS AGENT

Hello, (client's name)!?! (if they don't answer, repeat it)

PRO TIP: During this appointment booking process (DAY) represents the days that you are booking appointments for, and (TIME) represents the times you are booking. Please have those time slots readily available.

This is (your name) calling from (insurance company).

I'm calling regarding your life insurance policy with us. I wanted to inform you that your policy is currently not in force. I'm here to assist you with this and explore options to ensure you continue to have the coverage you need.

I understand that circumstances can change, and I'm here to help. First of all, I'd like to check if there were any specific reasons for the lapse, such as budget constraints or changes in your life that caused this lapse.

Thank you for sharing that with me. It's important for us to understand your situation so we can offer the best possible solutions. I want to let you know that we have a grace period available, which allows you to reinstate your policy without any penalties and redraft the amount.

Additionally, if your current policy strains your budget, we can explore more affordable options. Our goal is to provide you with coverage that meets your needs and financial capacity. Would you be interested in discussing these alternatives, or should we just redraft the premium?

Great! I will be in your area on (DAY) and (DAY); I can give you 10 to 15 minutes to get you the information.

So for (DAY), (agent's name) has a (TIME) or (TIME). Which one is better?

PRO TIP: If you already have read this to the client once, slow down the second time.

BONUS PRO TIP: This is the day and time spoke of previously in the PRO TIP.

Policy Conservation

CURRENT CLIENT
AS AGENT

If you don't mind me asking, is there a spouse or significant other involved?

PRO TIP: If you know they aren't married at this point and don't have a significant other, leave out the last line and click "No."

BONUS PRO TIP: If you already know the answer ok to click "Yes" or "No".

Great! Would that be a good time for them as well?

PRO TIP: Said with confidence as if you know it will be.

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down my name, its (your name), you spell that... (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME.

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Awesome, now I have you over here at (client address). Is that correct?

PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, I look forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Warm Market Practice

WARM MARKET
AS APPOINTMENT SETTER

Hello (warm market person's name)! How's it going?

(Agent's name) just started doing this insurance thing, and a part of his/her training is that he/she has to meet with 15 people to practice appointments before he/she can start seeing real clients.

Will you help him/her?

Great!

What is your schedule on (day 1) or (day 2) and he/she can just go through this stuff with you?

And will your spouse also be home at this time?

Great! Would this be a good time for them as well?

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down (agent's name) name, its (agent's name), you spell that... (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

THEY NEED TO GIVE YOU THE TIME BACK, IF NOT, YOU NEED TO REMIND THEM OF THE TIME.

That's right. Also, if you can, note that (he/she) could be 10-15 minutes early or late, depending on other appointments and traffic, but (he/she) should be there around (TIME).

PRO TIP: The day and time here are the agreed-upon appointment times.

Awesome, now I have you over here at (client address). Is that correct?

PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, (agent's name) looks forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

LEGACY PARTNERS

Warm Market Practice

WARM MARKET
AS AGENT

Hello (warm market person's name)! How's it going?

I just started doing this insurance thing, and a part of my training is that I have to meet with 15 people to practice my appointments before I can start seeing real clients.

Will you help me?

Great!

What is your schedule on (day 1) or (day 2) and I can just go through this stuff with you?

And will your spouse also be home at this time?

Great! Would this be a good time for them as well?

Okay, can you do me a favor and grab something to write with real quick? Let me know when you are ready.

PRO TIP: Make sure you wait for them to get something to write with.

First, can you write down my name, its (your name), you spell that... (spell it out from them so they can write it down). That was (DAY) at, ... shoot, what time was that again?

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PRO TIP: If you know the address is wrong, use the new address above.

That's all I have for you right now, I look forward to seeing you (DAY) at (TIME).

PRO TIP: This is the day and time that you just confirmed.

Customer Conversations

P R A C T I C E G U I D E

Introducing Yourself To The Customer
When you see a customer walk through the door, greet them and introduce yourself

Payments
When asking for payment, ask the customer how they would like to pay for their purchase. Provide multiple options if required.

Product Details
If your customer would like to know further details about a product and you are not sure on those details, reach for the "Product Details Guide".

Customer is Confused
Is the customer unsure as to what they would like to buy? Start to ask questions such as "is the purchase for you or a gift?" and "what occasion is the gift for?".

When There Are No Customers
When there are no customers in the shop, ensure you are looking busy instead of bored and doing nothing. This gives a bad appearance to potential customers passing by.

4 ESSENTIAL TIPS FOR BUSINESS DEVELOPMENT

Business development is essential for growth and success in any industry. Whether you're starting a new business or looking to expand an existing one, it's important to have a solid strategy in place. Here are four essential tips for business development

INGOUDE COMPANY

Conduct Market Research

Before starting any business, it's crucial to conduct market research to understand your target audience, competition, and industry trends.

01

Build Strong Relationships

Building strong relationships with customers, suppliers, and partners is key to long-term success.

02

Invest in Marketing

Marketing is essential for getting your business noticed and attracting new customers.

03

Stay Agile

Business development is an ongoing process, and it's important to be adaptable and open to change.

04

☎ 123-456-7890

hello@reallygreatsite.com

Scripts

LEAD TYPES & PRACTICE GUIDE

9 30 Second Cold Market

This script equips agents to set appointments with clients interested in mortgage protection, focusing on life insurance for unforeseen circumstances.

10 From a "to do" created

This script aids agents in arranging appointments with clients interested in final expense insurance, emphasizing coverage for end-of-life expenses.

3 Door Knock

This script prepares agents for "door knock" visits when clients are unresponsive to phone calls, offering strategies for courteous and effective in-person communication to discuss their insurance needs and concerns.

4 Internet Request

This script supports agents in responding to internet inquiries from potential clients exploring various life insurance options, including term and whole policies, facilitating discussions to identify the best coverage solutions for their needs.

5 Emergency Contact System

This script enables agents to explain the Emergency Contact System (ECS) to the network selected by the client, focusing on the role and importance of each member in ensuring prompt claim processing and support during critical times.

6 Warm Market "Practice"

This script is crafted for agents to practice their sales process within their warm market, offering guidance on effectively presenting insurance products and refining their approach in a familiar and supportive environment.

7 Policy Conservation

"This script is tailored for agents to capitalize on policy conservation opportunities, providing a structured approach to engage clients in reviewing and retaining their existing insurance policies.

8 Door Knock

This script prepares agents for "door knock" visits when clients are unresponsive to phone calls, offering strategies for courteous and effective in-person communication to discuss their insurance needs and concerns.

LEGACY PARTNERS
FINANCIAL NETWORK

Customer Prompts Guide

Introducing Yourself To The Customer

- My name is Olivia Wilson and I am here to help you with your shopping experience.
- Hi there, my name is Aaron Loeb and I'd be happy to assist you.
- Hi, is there anything I can help you with today?

Product Knowledge

- Our products are made with high-quality materials and come with a 1-year warranty.
- Our products are designed to be durable and long-lasting.

Recommendations

- Based on your preferences... (state best product/s based on the customer's preferences).
- I'm going to present three options including a low, medium and high priced products for your consideration.

Promotions

- We currently have a 10% off promotion on all items in-store and online.
- Don't forget to check out our website for any ongoing promotions at reallygreatsite.com.

Checkout / Completing The Transaction

- Let's head to the checkout counter to complete your purchase.
- Is there anything else I can help you with today?
- Is that all that you were looking for today?

Customer Prompts
Practice Script Guide

Introducing Yourself

"Hi my name is Olivia and I will be helping you today. How can I help you find what you're looking for today?"

Payments

"We have various payment options. How would you like to make payment today?"

Customer Is Confused

"So you're not sure on what you'd like to purchase today. That's okay, I'll help you! What occasion is the gift for? Who is the gift for? What are their hobbies?"

Product Details

"What were you wanting to know about this product? Is this product for yourself or for a friend or family member?"

Customer Wants To Think About Purchase

"That's great that you'd like to think about the purchase, however I'd like to remind you that this price is only for the weekend as the sale ends on Sunday."

Customer Wants To Make A Return On A Purchase

"That isn't a problem. I will require the purchase receipt, the product and packaging before I can process the return."

Rebuttals:

- **What is this for? - Yeah, this is really to make sure everything is updated on your policy and that everything works the way you want when you need it to, so would morning or afternoon be better?**
- **I'm not interested. - Yeah, so this is just a required review, but like I said it only takes about 10 minutes, so would morning or afternoon be better?**

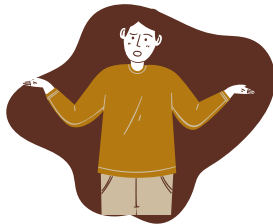# Script Prompts

Customer Practice Script Guide

01 - Introducing Yourself

"Hi my name is Olivia and I will be helping you today.
How can I help you find what you're looking for today?"

02- Payments

"We have various payment options.
How would you like to make payment today?"

03- Customer Is Confused

"So you're not sure on what you'd like to purchase today. That's okay, I'll help you! What occasion is the gift for? Who is the gift for? What are their hobbies?"

04 - Product Details

"What were you wanting to know about this product? Is this product for yourself or for a friend or family member?"

05 - Customer Wants To Think About The Purchase

"That's great that you'd like to think about the purchase, however I'd like to remind you that this price is only for the weekend as the sale ends on Sunday."

<u>For Older leads:</u> (add in first line – form that you sent in a while back, requesting).

<u>When Calling Mortgage Protection leads:</u> Change the first line only - I'm getting back to you about information that you sent in requesting the information on the Mortgage Protection.

<u>When calling all other types:</u> If they call in say you're getting back to them about the call in request they made If it is Direct Mail lead say that you're getting back to them about the form they sent in requesting the information on the……. (Whatever the lead is for).

<u>Common Objections:</u>

- Always end talking on a question – This is how you control the conversation

- When handling objections the goal is to redirect and then get back to the script using a transition statement.

All of these revert back to:

- Anyway, my simple job is just to get the information out to you, what time did you say you worked tomorrow & (Day after Tomorrow)?

- The important part is getting back to the script

- These are a few of the lines you could use in these situations

We don't remember – This is (Name) right? Over on (address)? (Wait for response) You put down (verify information) Busy, or work real late☐ What is the latest you could possibly be home tomorrow or (Next Day)?

Already took care of that - That's exactly why I'm calling, I'm the person who is supposed to come out there and review everything with you. Anyway…what time are you working tomorrow?

Not Interested anymore - Awesome, that makes my job very simple; I'm just the person who gets the information…… Do you have to come to the house? Yes, I have to verify that you're not 1000lbs, chain smoking, with an oxygen tank and not telling the insurance company about it…Anyway, what time did you say you're working (Next 2 days).

- When dialing the phone, if you talk to 3 people, call somebody and ask for coaching.
- Call let it ring 4 times, Hang up, wait 4 seconds hit redial. No messages.
- Schedule blocks of time to make calls ---- Min. 35 Dials/hr.
- Track your numbers - Dials, Contacts, Apts. – use tally marks on paper.

Don't Quit and YOU WILL SUCCEED.