v1.3

The "Over The Phone Sell" Script

Notice: If calling the new Facebook Leads. You need to call them as soon as you receive them. Waiting only hurts you, and you definitely do NOT want to schedule a later time to talk as it will most likely end in a "no-show".

Script -

Ring.. Ring…

You: Hey XXXXX, hey XXXXX it's [your name], how are you?

Them: Some answer… Like.. "I'm good"...

You: "Good good…" or something like that...

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[If Facebook]

"So you were just on Facebook, seeing if you **QUALIFY** for that state regulated final expense program for either burial or cremation.."

[If FE DML]

"So I'm with the Senior Benefits Center and I see here you sent in a form to see if you **QUALIFY** for that state regulated final expense program for either burial or cremation is that right?"

[If MP DML]

"So I'm with the Mortgage Protection Center and I see here you sent in a form to see if you **QUALIFY** for that state regulated mortgage protection or payoff program is that right?"

If they are confused or don't remember any of these, just say,

"No big deal.. I know you are probably getting a lot of mail right now and might not remember.. Let me verify it's you here on the form to make sure I have the right person…"

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Them: “Yes”

You: Oh oh ok great… I just need to verify some of your information… I see here you put XXXXX as your favorite hobby is that right? ***(The Hobby Part will not be on DML Leads)***

(If you can.. Ask a couple questions about their hobby - be sincere)

…..and your birthdate is….

Them: Yes…

You: Ok, do you have 5 or 10 minutes for me right now?

Them: Yes…

You: Great.. So tell me first what you were kind of thinking about when you filled this form out… were you thinking about your kids, grand kids, your spouse.. Or something else…

Them: They tell you..

You: Ahh that’s nice… what’s their names?

(mention their names throughout the call - not overboard though)

Transition and setting expectations:

After your small talk about their hobby and who they are trying to protect it’s important to set expectations for how the call is going to go.

I have been saying this:

You: “Ok, let me explain how this process works.

I’m going to ask you some basic health questions that will help me determine what programs you might qualify for..

Based on your answers, we’ll find a plan that fits your needs and most importantly your budget.

If we find something that fits, we will fill out an online application and submit it to the carrier for underwriting and hopefully an approval.

If you get approved, they will mail you a package for you to look over your coverage and will also draft the first month's premium while you review.

The state of XXXXX gives you 30 days to review your coverage to make sure it's exactly what we cover today. If everything looks good, you don't have to do anything, if something isn't quite right, you can call me directly and we will correct the issue.

Do you have any questions about this process and are you comfortable with it?

Good! Let me ask you a couple of pre-qualifying question first:

1) Do you have an email account that you have access to right now either on your phone or maybe a computer nearby?
2) Are you a US Citizen?
3) Do you have a checking account with a bank in the United States?

Ok.. tell me a little about your health… for instance, any heart attack, cancers, or strokes in the last 5 years? Ever had Kidney disease or complications with Diabetes such as an amputation or been in a Diabetic coma?"

…..Then you kind of just take it from there… use your small talk skills to keep the conversation moving along and friendly but sort of official..

Looking forward to more tweaks as we continue to improve upon our technique!!!