

INTRODUCTION

"Hello John (PAUSE) my name is _____.

*We're just getting back to you about that online notice you sent in regarding life insurance coverage and I need to take 30 seconds to verify the information you provided and that way we can work up several options for you. (**DO NOT PAUSE—JUMP RIGHT INTO HEALTH QUESTIONS**)*

Top 5 Responses to Objections

1. "That's exactly why I'm calling..."
2. "When you say you're all set/not interested, what do you mean by that?"
3. "Clearly this was important to you at the time, what's changed since then?"
4. "I speak with several hundred people a day, I don't have the ability to do that."
5. "It's fine you don't remember, that occasionally happens, here is what I have."

QUESTIONS (get them in the rhythm of saying "Yes") (Choose the top 5 questions to ask them from the lead spreadsheet, and finish by saying "Is that correct?")

1. FINISH WITH THIS QUESTION: Most importantly, when you sent in the form, who were you looking to protect most? Was it mostly for coverage on you, (spouse), or both? **DRAW OUT THE PAIN & EMOTION!!!**

SET APPOINTMENT (always set appointment within 24-48 hours)

*Over the next few days, I will be in your area. I am available on _____ time or _____ time. Do any of these times work best for you/and your spouse? **Spouse MUST be present!***

Ok, I scheduled you for that day and time. This works for both of you? Great.

OBJECTIONS

I NEED TO CHECK WITH SPOUSE: Let's do this, let's find a time that you know works best for the both of you. Assuming this time works for your spouse, is _____ (name time) **a good time to meet?**

YES : I'll hold the spot, please give (*him/her*) a quick call after we talk that would be great and if it **DOESN'T WORK**, could you call me back today at _____ (give deadline). If I don't hear from you by then I'll assume we are all set and I'll look forward to seeing you at the appointment time.

NO: (Go back to date and time progression)

UNSURE: I'm meeting with 5 people that day, so if you aren't sure let's find another time that works (Back to date and time progression)

FINALIZE MEETING

"That should be all I need. What time did I say again? Ok, please write down that time at the top of your paper as I will be there. Finally, so that I can locate your home:

1. When I plug your address into my GPS, will it take me right to your home?
2. What color is your house?
3. Should I park in the street or driveway?
4. Do you prefer a doorbell or knock?

"Great. I look forward to seeing you then. Have a good day!"