

*(Make Sure You Have A Proper Opening Spiel. Introduce Yourself And The Company You Represent Right Away)*

Hi, Can I Speak With? Mr. /Mrs. /Ms. \_\_\_\_\_, Please This Is \_\_\_\_\_ Calling From ABC Life Insurance! How Are You Today?

*(Explain The Purpose Of The Call And Give Them A Brief Summary Of What You May Be Able To Do To Help Them. Also, Test The Level Of Interest By Using Trial Closes Such As " So When Would Be The Best Time To Have Them Call You Tomorrow To Talk About Life Insurance?")*

The reason for this call is to inform you that we have agents in your area offering free, no obligation quotes on life insurance. Would you like to see if you qualify for our program? We are providing families like yours an innovative solution with their life insurance planning. When is a good time to have one of our agents give you a call tomorrow?

*(At This Point, The Customer Will Probably Start Throwing Questions At You Or Start To Resist You, The Best Thing To Do Is To Make Sure You Acknowledge Their Questions Or Concerns And Answer Them Correctly And Confidently, This Is Where Your Rebuttals Come In)*

### **Rebuttals:**

It's never too early/too late to secure your future for your family and your retirement.

It's just a quick call and there's absolutely no commitment for you to buy.

If they already have a life insurance plan, No problem but we would still like to give you the chance to compare rates.

*(When You Feel That You Were Able To Handle The Customers Concerns, Take Them To The Next Step Immediately By Starting To Ask All The Necessary Questionnaires To Make Sure That They Are Qualified, One Tip On Gathering Information Is To Just Sound Casual On Asking For Them, Never Make It Sound Like A Big Deal. And Again, A Little Trial Close At The End Will Also Help Out A Lot)*

### Collect Information

I just need to ask you some questions to make sure you qualify for the program and then I can either transfer you to one of our specialist or set and appointment to have him call you back at time of your convince.

### Mandatory Questions

May I Know Your Age?

Approximate Annual Income?

Have You Ever Been Seriously Ill, Such As Cancer, Heart Attack Or Stroke?

Are You Currently Taking Any Prescription Medicines?

Do You Already Have A Life Insurance Policy? *(If Yes, With Whom?)*

**Live Transfer** – Okay, that's all for now please hold while I connect you with our loan specialist.

**Next Day Appointment** – Okay, that's all for now. So when is good time to have our loan specialist call you tomorrow?

*(When Setting An Appointment Make Sure To Remind Them Of The Date And Time To Finish The Call Strong.) Thank You, Have A Great Day And Please Don't Forget Our Appointment Tomorrow At 10:30am.)*