When calling to pre-set appointments you want to keep it short and quick but effective.

The script should be followed to the letter. It is important that all phrasing and prepositions be kept the same as what is written below.

I always like to call in the 3rd person.

( ) are sections where you input your response or situation
< > are for notes on why it is important or how it show be handled.

<Ask for the person by FIRST NAME. The names are very important to get the right pronunciation the first time. Take a second before you call the lead and get the name pronounced correctly. If you mispronounce someones name they immediately assume you are a telemarketer and are on the defense immediately. >

Hi (FIRST NAME), this is (YOUR NAME) calling from Senior Life Insurance Company. You just recently requested information by *(calling off our TV Commercial, responded to one of our post cards in the mail or responded to our FaceBook ad)***. When you did that were you wanting this information for yourself or a loved one?**

<Let them answer. Do not ask if they remember or anything like that. The purpose of asking them if they want the information for themselves or a loved one forces them to answer in a way that you need. It doesn't allow for anything other than themselves or a loved one>

Great, (YOUR NAME), who is one of our final expense specialist is available to go over your options and answer any questions that you may have. What would be a good time (YOUR NAME) to contact you and deliver that information? Morning, afternoon or evenings?

<Set a time>

Are you still located at (ADDRESS)? *<If no, ask for the correct address>*
And you are (Age), year young? *<If no age, ask for the age>*
And, again this information will be just for you or for a loved one as well?

Thank you very much for your time and again, Final Expense Specialist (YOUR NAME) will see you (APPOINTMENT TIME). Take care and have a great rest of your day.

Good Bye.

Questions and Objections:

The easiest way to handle any question is to simply say: “That’s a great question and I will make a note here to make sure that your Specialist answers that for you.” Then actually make a note for the specialist. You can always simply state that you are only the appointment setter and the expert will have the answers to all their concerns.

What if the client states they already have coverage or already taken care of that? “That’s great that you already have that taken care of. This information here is free. Would you like to make sure you are not paying too much or missing anything?”

What if the client says they are not interested anymore? “I understand that and we do have some new products that just got approved in your area. This information here is free. Would you like a Final Expense Specialist to provide you with that information?

Where are you located? “We are based out of Thomasville, Georgia. But we have Specialists available across the country.”

What’s the name of your company? “Senior Life Insurance Company”