

Sales Script

(Greeting) -Use Objections in Greeting Guide-

Hi, _____ (**First Name Only**), this is _____ (**First Name Only**) from the Senior Care Plan! I'm calling to go over some information that you had requested and I wanted to provide you with pricing, terms, features & benefits and anything else you need in order to make an informed decision and I would like to do that for you as quickly as I possibly can.

When you called our commercial did you call for yourself or for a loved one?

(Wait for Answer)

Ok, well I can help you out with that today.

(Process)

_____ (**First Name ONLY**) our plans start as low as \$12 a month based on various factors such as your age and health. However, most people pick a plan ranging between \$55-\$85 a month, but we'll definitely find what's comfortable for you. So my job here today is to share with you exactly what you and your family will get for that money so that you can make sense of it! So what I'm going to do right now is get some basic information from you to see what discounts you qualify for and then we can get this application processed right over the phone and mail everything to you in writing.

(Fact Finding)

So I can custom fit this plan to exactly what you want, need and can afford, I have a few questions. *(Write their answers down so you don't forget!!)*

What prompted you to call into our TV Commercial?

Do you prefer cremation or burial?

How much do you estimate a funeral to cost?

Who will be the one charge of your funeral arrangements when you pass away?

Is there anyone else that needs to be on this call with us?

(Qualify)

Alright, thank you so much for that! Let me check all the health discounts that you qualify for real quick.

(Use the SLICE App to ask them questions & qualify them. Pick the plan that shows up highest on

list (Do not choose Easy Issue or any term policies), & then Stop when you get to Premium page and proceed with presentation below.)

(Presentation) -Use Objections in the Presentation Guide-

_____ **(First Name)**, based off what you told me so far it appears that you **MAY** qualify for one of our best plans.

Now, _____ **(First Name)**, I am sure you can agree with me when I say that everybody's needs are different.

(Pause)

But what I have found out, is that it doesn't matter who I am talking to we all have one thing in common. We all want to take care of our family.

(Pause)

I know you are probably like most of my customers and you just want to make sure that you have some protection in place for your family when they need it the most. Isn't, that right?

(Pause)

Well, every day I help a lot of customers, just like yourself, take the financial and emotional burden off the family and give you some peace of mind.

(Pause)

Because I talk to a lot of people, something I hear a lot is someone passing away that did NOT have any protection in place.

(Pause)

And then of course I hear how hard it was on the family because they had to come up with the money. In most cases, they had to pass a collection plate at church or raise money through fundraisers and other things like that.

Obviously, it says a lot about yourself... Not wanting to place a financial embarrassment on your family during one of the toughest times of their lives. I would like to take the opportunity to commend you for taking care of this in advance.

(Pause)

We are going to help you be prepared by providing you with a memorial guide to help you with pre-planning your funeral and any last wishes you may have. You will be

able to write down all the desires and wishes that you want such as songs to be sung, casket selection, pall bearers, obituary wording, or maybe even a favorite scripture to be read during your service and so on.

_____ (**First Name ONLY**), when was the last funeral you attended?

(If recent extend condolences)

Well, you have probably seen first-hand how helpful a memorial guide could be, by having all those things pre-planned in advance.

(Pause)

A few minutes ago you said that you prefer (cremation or burial).

(Pause)

(If Cremation)

The average cremation in your area is \$2,500 - \$6,000. Sure have gone up over the years haven't they?

(Wait for Answer)

Your plan also comes with an enrollment to Legacy Assurance. Legacy Assurance is a company committed to reducing the financial and emotional stress of planning a funeral. They do this by negotiating funeral prices and price shopping for you and your family at a time when they need the most help. You will also be able to lock in the price of funeral merchandise like an urn for only \$99, compared to several hundred. Best of all you don't have to pay for this merchandise until you pass. You will also have living benefits such as access to 24 hour Tele-Doc services, and discounts on diabetic supplies and hearing aids.

As example, **(Give true story examples)**

I will explain more about this later but this feature alone will save your family thousands of dollars.

(If Burial)

The average burial in your area is \$8,000 - \$12,000. Sure have done up over the years haven't they?

(Wait for Answer)

Your plan also comes with an enrollment to Legacy Assurance. Legacy Assurance is a company committed to reducing the financial and emotional stress of planning a funeral. They do this by negotiating funeral prices and price shopping for you and your family at a time when they need the most help. You will also be able to lock in the price of funeral merchandise at a fraction of what it costs today. These items include caskets for only \$1,500, burial vaults for \$750, headstones or markers starting at \$500. Best of all you don't have to pay for this merchandise until you pass. You will also have living benefits such as access to 24 hour Tele-Doc services, and discounts on diabetic supplies and hearing aids.

As example, **(Give true story examples)**

I will explain more about this later but this feature alone will save your family thousands of dollars.

(Continuing...)

Now, let me re-iterate what the TV commercial stated:

Your policy is a permanent whole life plan, this means that you have guaranteed protection for the rest of your life.

Your premium will NEVER increase and your benefits will never decrease.

If you die in an accident, it doubles the face amount of your policy

You will be covered from day 1, with no waiting period **(Only if Immediate benefit plans)**

We don't do any medical exams to get you qualified we just ask a few health questions directly over the phone here for the home office.

Most importantly, we pay our claims in 24 hours.
Do you know why we pay our claims so fast?

(Pause)

Well, it's simple when you leave this world you are gone and not coming back....

(Pause)

It WILL be one of the toughest days of your family's life...

(Pause)

So, we want to provide these funds to your family the same way you would if you were still alive. And don't you think that is just the right way to do business?

(Pause)

(Close) - *Use Objections in the Close Guide*

_____ **(First Name)**, I am going to share with you 3 different protection amounts.
(Have them get a pen and paper and write it down. Be descriptive)

Price #1

Price #2

Price #3

Face Amount

Accidental Protection

(Continue moving forward in SLICE)

Now, while you look these over, what is your mailing address to mail everything to?

Whats is your middle name?

OK, provided I can qualify you, who do you want to have listed as your primary beneficiary to receive these benefits?

(Continue to fill out the application and follow the steps through SLICE.)

When you filled out everything and you get to the banking information you say:

_____ **(First Name ONLY)**, Congratulations you qualify today!

What plan would you like to start with and leave to _____ **(Beneficiary)**?

So we set this up on our bank service plan. Would you be using your checking or savings account?

What bank?

(Wait for Answer)

I have the routing number here from our database, all I need is for you to please get your checkbook and read to me your account number.
And while you are getting your account number, you can also pick your due date for each month moving forward, so what day would you like: the 1st, 3rd, 5th, 10th, 15th, 20th, or 25th?

Ok, I'm ready for that account number now....

(Then go straight to recording and say:)

_____(**First Name**), I'm about to start a recording, which is our way of getting a voice signature from you. I need to read off some information to you and you'll need to answer some questions that we've already gone over so let's just try to get through this as quickly as possible!

(Start recording and read it all verbatim.)

Lastly just like you did a warm up, do a warm down!
Explain to them that they'll receive the policy and a packet from Legacy Assurance within two weeks, and then GET REFERRALS.
No need to rush off the phone.

Please keep in mind that you must finesse in the warm up / rapport building all throughout the pitch. There is no perfect pace as each call will be a bit different.

If all else fails, use the FORM method (Family, Organizations, Recreations, and Move/transition to close)