



In-Depth Phone Script

Set & Go Script

The "Set & Go" script is designed to be a 1 to 2 minute call with the objective of setting the appointment based on the client's interest as determined by their response to a direct mail piece, telemarketing call or an internet submission.

In this case it is combined with the "In-depth" script to provide more background about the client's current and past health issues. This information will give the agent the opportunity to evaluate the client and determine which product is best suited to meet the client's needs.

Hi John, how are you today? John, my name is _____ (Agent) and I'm the final expense life insurance specialist for you area. John we received your request for information regarding burial life insurance.
(indicate how you received John's information; direct mail, telemarketing, internet etc..)
These plans pay a benefit that will handle your final expenses including burial.

John my job is to visit you and go through the pricing and details of our final expense burial plans. Are mornings or afternoons better for you?

Ok, let's meet _____ (day of the week) at _____ (time). (Try to set appointment no more than 1-2 days out).
John, I just want to confirm your address. I have _____ (their address as supplied in the lead data).

John, Is there another phone number besides the one I dialed?

John, I'd like to give you my phone number so that you can contact me if anything changes with our appointment. Once again John my name is _____ and my phone number is _____ (agent phone number) and I'll see you on _____ (Day) at _____ (Appointment time)

John, I just have a few more questions that will help me pull together your prices and determine which plans you qualify for based on your health.

John, what is your date of birth? **Client response:** _____ and how tall are you? _____, how much do you weigh? _____

And are you are smoker or a non smoker? **Client response:** _____

Do you take any prescribed medicines for anything? **Client response:** _____

Have you ever had a heart attack or stroke? Ever diagnosed with cancer? **Client response:** _____

Do you currently have diabetes? If yes, do you have neuropathy or nerve pain in your hands or feet?

Have you been hospitalized for anything at all in the last two years? **Client response:** _____

How much coverage are you looking for? **Client response:** _____

*******Always attempt to set the appointment at the end of the call no matter where the conversation led.***** If the client has had major health conditions, heart attack, stroke, cancer, congestive heart failure or insulin dependent diabetes, steer them toward the simplified issue whole life products as term will not accept these or most serious issues.**