Virtual Internet Lead Script

Client: Hello

Agent: Say this first sentence without pausing and assume it is the person on lead)

Hi, (client first name) this is (your full name) I am calling you back, because you asked me to give you a call. A while back you filled out a form online that talked about protecting your family when you pass away. I am the medical underwriter, how are you doing today?

Okay thank you, so just to verify your information. I have your DOB as\_\_\_\_\_\_\_ and your address as\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Is that correct? **(Verify other information if you have it)**

I am setting up appointments over the phone for later today and wanted to see what time you get off work (or are you retired)? It should only take about 15 minutes do you have a spouse or someone you live with? (**Give only two options and make sure they are both available) If they ask why then you ask, will they be the beneficiary?**

**Example:** Does 5:30 or 6:30 work better?

Perfect, can you grab a pen and paper? Please write my Name and the time down. (Spell out your full name very slow)

I want to make sure you are not driving and at a place where you can take notes. Will you be at home around \_\_\_\_\_?

Okay great! These appointments are very important and I want to make you sure you will pick up the phone when I call around \_\_\_\_\_. Give me 15-20 minutes in case I am running behind and maybe helping another family.

Can you do me one more favor? I’m going to send you a confirmation text with My name and time for the appointment. This appointment is very important so we make sure you get the options you requested. Please add this appointment in your phone calendar and set the reminder 10 minutes prior to appointment time. If you cant make it please do me the courtesy of texting me back. Thank you and I will speak with you and your spouse around \_\_\_\_\_\_\_\_.

**\*OBJECTION:** I am a Medical Field underwriter and a National Broker. I just need to see if this makes sense for you and your family. I work with companies like Mutual of Omaha, AIG, Transamerica, and 25 other carriers. The appointment only takes 15 minutes. Does now work better than later?

**OBJECTION:** So someone else already helped you? Really? The paperwork was not filed correct so I need to go over the policy really quick because if they didn’t disposition the paperwork then you probably don’t have the best policy. Does afternoons or evenings work better?