

TEAM PHONE SCRIPTS

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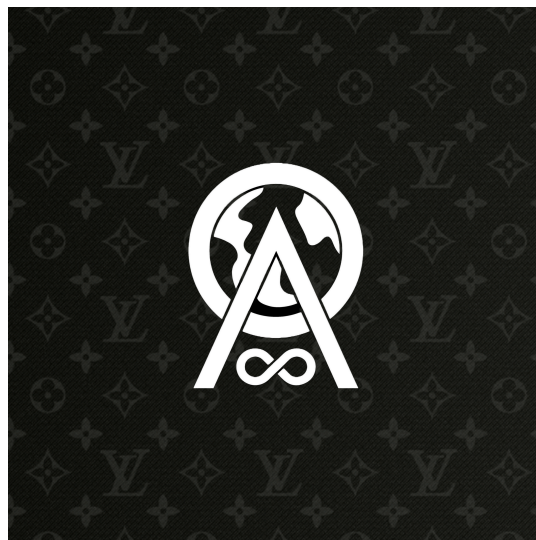
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PAVET PHONE SCRIPT

Hi **(MEMBER)?!** This is **(NAME)** with the Veterans division of Globe. I was calling regarding the veteran burial and will kit you requested in **(MONTH)**, using the security keyword **(WORD)**. Does that ring a bell?

(IF NO) No problem. I'll back up and fill you in. On **(date)** you requested info on a veteran burial and will kit using the security keyword _____. **(Client name)** are you a veteran? Is your mailing address still ____? And your email address is ____? Okay, perfect. I just need to set up a quick call to discuss what you're entitled to. **(proceed with rest of script)**

(IF YES) Okay perfect... **(client name)**. I just need to verify a few things. I have your mailing address as _____, And your email address is ____? All I need to do next is issue your no-cost benefits, and most importantly explain the updated VA burial benefits that you and your family are entitled to. It doesn't take long depending on how many questions you might have.

(MEMBER) are you currently working, or are you retired? **(Mention spouse if married)** Are you home right now? I can do one of two things, we can take care of this out right now and get this taken care of quick, or we can set up a time later today, like I mentioned it won't take long either way as I'm very busy. Which would you prefer?

(Now) Okay great, toss me on speaker phone and I'll text you this ZOOM link really quick.
(flip them on zoom)

(Later) Okay great, it will be tight, but I have an opening between ____ and ____ OR between ____ and ____ which one is better? **(BOOK EVERY 30 MIN)**

(Neither) Okay no worries, but I will say I am very busy, especially with the number of veterans requesting to be seen so we need to get this taken care of sooner than later. What time of day is typically least hectic for you, morning, afternoon, evening? Ok I can do between _- OR _- tomorrow but if you don't mind, I'll have to give you the quick version. Which one works best? **(BOOK EVERY 30 MIN)**

(Set/Solidify Appt) This is your cell phone, correct? Great. I'm going to send my credentials, date & time for your zoom meeting which again **(Repeat day and time they are scheduled)** and a link to your zoom meeting that's at the bottom of the text message.

(Client's Name) Can you do me a favor? (Wait for response) Once I send you the reminder text. Can you be sure to text back and respond with the word "CONFIRM" or "Ok" so we know you received it? **(Wait for response)**

(Client name) is there any reason at all you see yourself missing this appt? Okay great please make sure you are there because if we say yes to you that means we are saying no to another veteran, make sense?

One last thing, please make sure you're in a quiet place for the appt as we are going to be covering some very important information.

Looking forward to seeing you **(day, date and time)** God bless!

PLUS LEAD PHONE SCRIPT

Hi (Client name)? (Client name) this is (your name) with GLOBE LIFE AIL. I handle your (relationship) (name of sponsor) benefits and the reason I'm calling is they sponsored you in to a private benefits package that traditionally only veterans have access too so, make sure you thank them!

(Client name) they have your benefits package processed and I just need to activate it for you (and your spouse). It doesn't take long but it is very important.

(MEMBER) are you currently working, or are you retired? (Mention spouse if married) Are you home right now? I can do one of two things, we can take care of this out right now and get this taken care of quick, or we can set up a time later today, like I mentioned it won't take long either way as I'm very busy. Which would you prefer?

(Now) Okay great, toss me on speaker phone and I'll text you this ZOOM link really quick. (flip them on zoom)

(Later) Okay great, it will be tight, but I have an opening between ___ and ___ OR between ___ and ___ which one is better? (BOOK EVERY 30 MIN)

(Neither) Okay no worries, but I will say I am very busy, especially with the number of veterans requesting to be seen so we need to get this taken care of sooner than later. What time of day is typically least hectic for you, morning, afternoon, evening? Ok I can do between _- OR _- tomorrow but if you don't mind, I'll have to give you the quick version. Which one works best? (BOOK EVERY 30 MIN)

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(Client name) is there any reason at all you see yourself missing this appt? Okay great please make sure you are there because if we say yes to you that means we are saying no to another veteran, make sense?

One last thing, please make sure you're in a quiet place for the appt as we are going to be covering some very important information.

Looking forward to seeing you (day, date and time) God bless!

RC VET PHONE SCRIPT

Hi (MEMBER)?! Hi (MEMBER) my name is (Agent). I'm with the Veteran Division of Globe, working in cooperation with (STATE) (VSO). I'm calling because you recently received a letter about your Group Death Benefit and you filled out a 3x5 card naming your (beneficiary relationship, beneficiary name) as your beneficiary.

Do you remember filling out that card?

IF NO: No problem, let me confirm the information that you wrote down. You wrote down your address as ___, Is that correct? Perfect! You also wrote down your Date of Birth as ___, Is that correct? Perfect!

IF YES: The reason I'm calling is that your benefits have been processed and it's my job to issue your Burial Guide but most importantly explain the VA burial benefits that you and your family are entitled to receive.

(MEMBER) are you currently working, or are you retired? (Mention spouse if married) Are you home right now? I can do one of two things, we can take care of this out right now and get this taken care of quick, or we can set up a time later today, like I mentioned it won't take long either way as I'm very busy. Which would you prefer?

(Now) Okay great, toss me on speaker phone and I'll text you this ZOOM link really quick. (flip them on zoom)

(Later) Okay great, it will be tight, but I have an opening between ___ and ___ OR between ___ and ___ which one is better? (BOOK EVERY 30 MIN)

(Neither) Okay no worries, but I will say I am very busy, especially with the number of veterans requesting to be seen so we need to get this taken care of sooner than later. What time of day is typically least hectic for you, morning, afternoon, evening? Ok I can do between _- OR _- tomorrow but if you don't mind, I'll have to give you the quick version. Which one works best? (BOOK EVERY 30 MIN)

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(Client name) is there any reason at all you see yourself missing this appt? Okay great please make sure you are there because if we say yes to you that means we are saying no to another veteran, make sense?

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CONTINGENT BENEFICIARY PHONE SCRIPT

Hello is ____ there?

Hi, this is _____ service manager with American Income Life, I handle your (relationship), (name) life insurance benefits through the (veterans). The reason I'm calling you is, your _____ nominated you as their contingent beneficiary for their life insurance policy. Now what this means is that if God forbid their primary beneficiary were to pass away before them you would then be responsible for handling the funeral arrangements upon their death.

Now it's our service policy that I review some very important claim forms and explain how to file a claim, so you're prepared if something does happen. We have an A+ insurance company rating and we do things like this to make sure we keep it. On top of this, I'm going to be issuing you some additional no cost benefits on behalf of our company as a way of saying thank you for taking on such a big responsibility.

The best part about this is that you're going to have access to some of the exclusive benefits that groups like the veterans, police & firefighters, but you would have but you would have to qualify for those!

My schedule is crazy, but I promised ____ I would make you a top priority this week.

(CLIENT) are you currently working, or are you retired? **(Mention spouse if married)** Are you home right now?

I can do one of two things, we can take care of this out right now, or we can set up a time later today, like I mentioned it won't take long either way as I'm very busy. Which would you prefer?

(Now) Okay great, toss me on speaker phone and I'll text you this ZOOM link really quick.
(flip them on zoom)

(Later) Okay great, it will be tight, but I have an opening between ____ and ____ OR between ____ and ____ which one is better?

(Neither) Okay no worries, but I will say I am very busy, especially with the number of veterans requesting to be seen so we need to get this taken care of sooner than later. What time of day is typically least hectic for you, morning, afternoon, evening?

Ok I can do between _- OR _- tomorrow but if you don't mind, I'll have to give you the quick version. Which one works best?

(Set Appt) Please grab a sheet of paper and pen for me, write down my name, my agent ID and I'll be calling you **(day, date, time)**. **(member)** is there any reason why you wouldn't be able to make it at that time? Okay perfect **(CLIENT)** I do work by appointment only, but I'm

going to try and be as accommodating to your schedule as much as possible. So please return the courtesy and make sure you're in a quiet place for our call, look forward to seeing you then! **(Immediately text them id badge along with zoom info if not a flip)**

GLOBE LIFE LEAD PHONE SCRIPT

Hi, **(Client Name)**? **(Client Name)**, this is **(Your Name)** with Globe Life American Income Division.

The reason I am calling is complete your globe life application. Now, I have your address at **(Verify Address)** is that correct? Ok, Great.

Now, were you looking to cover yourself or someone else? Ok. Great.

Now **(Client Name)** you didn't list your beneficiary. When something happens to you who do you want the money to go to? **(Do you have a spouse?)**

Yes Spouse: Ok great they will need to know how everything works. What is their name?

No Spouse: Not a problem, then this just applies to you then.

Now, the next step is to verify your eligibility, show you everything you qualify for, designate **(Beneficiary Name)** as your beneficiary and complete the application process. It usually just takes 20 minutes depending on how many questions you have. Does that sound fair?

Great! The way we will connect is through Zoom. Do you have a smart phone or laptop or tablet?

Smart Phone: Okay great, I am going to text you the link so you can access the benefit portal. Let me know when you receive it.

Laptop/Tablet: Okay great, I am going to email you the link so you can access the application portal.

(Zoom Instructions)

*Go ahead and click the link and let me know what you see. **(Walk Through How To Download Zoom)***

*Now go back to the text I sent you, click the link again. **(Enter Password If Required)***

Join with video and use internet audio, now you should be able to see and hear me.

Hey **(Client Name)**! - It's nice to put a face to the name and good job getting this far! You are a pro now at zoom. Actually **(Client Name)** looking at my schedule I have a few minutes before my next family. I can do you the favor and squeeze you in right now. Sound fair?

Spouse Available: Great, go ahead and let **(Spouse Name)** know we are going to meet right now and we will get started.

Not Available: No Problem, they actually have us work by appointment only, so we need to set a time that works best for both of us. **(Go to Appointment Setting)**

What time of day is typically least hectic for you, morning, afternoon, evening? Ok I can do between _- OR _- tomorrow but if you don't mind, I'll have to give you the quick version. Which one works best? **(BOOK EVERY 30 MIN)**

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One last thing, please make sure you're in a quiet place for the appt as we are going to be covering some very important information.

Looking forward to seeing you **(day, date and time)** God bless!

PHONE REBUTTALS

Can't you send this to me in the mail? I wish I could, that would make my job so much easier but its all done digitally now. My job is to walk you through how to fill out your will through our no cost portal and also explain to you what you're entitled too. Like I said before it wont take long...

I already know my benefits. Perfect, that will make my job much easier! This is just to get out everything they set up for you that you as a veteran are entitled to you can do whatever you want with that information. Like I said before it wont take long...

I don't want to buy anything/I already have insurance. Perfect, that will make my job much easier! Remember these are benefits you already have. My job is to explain what you're entitled to, what you do with that information is entirely up to you. Like I said before it wont take long...

You're not trying to sell me anything are you? My job is to go over everything that you're already covered for and entitled to, what you do with that information is entirely up to you. Like I said before it wont take long...

I don't have time right now. I completely understand, I'm slammed as well. What time of day is least hectic to knock this out for you? Morning, afternoon or evening? **(book appt)**

I don't remember requesting anything/What is this about? On **(date)** you requested info about your veteran burial and will kit using the security keyword _____. My job is to get out the information to you and answer any questions you have.

I don't want to do this. Just to confirm, you don't want your no cost benefits package valued over \$4k? You just want to toss them out?

Why do we have to meet through zoom? For quality and compliance purposes. Company policy. Like I said it wont take long...

Does my spouse have to be there? They ask that the spouse is present so that they are aware of any survivor benefits and what they need to do when they need help. Like I said it wont take long...