

SCRIPTS FOR SUCCESS



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LEARNING WHAT TO SAY

Primerica has a proven track record of helping millions of families get the right amount of life insurance coverage, become debt-free and prepare for retirement, so there is never a need to deviate. We always do what's right, and we never want to say things that could be misinterpreted.

These approved scripts are designed for the various ways you may reach out to your hot and warm markets – including via phone or in face-to-face conversations. It is very important that you learn to say these scripts as they are written. Always using these scripts gives you the assurance that you are using the right words.

Practice saying the scripts in front of the mirror and with a partner until you master the words and feel confident.

Record the Script Number(s) selected by your RVP

Script # Selected: _____ Date Mastered _____

Script # Selected: _____ Date Mastered _____

Script # Selected: _____ Date Mastered _____

Script # Selected: _____ Date Mastered _____

Script # Selected: _____ Date Mastered _____

Script # Selected: _____ Date Mastered _____

SUCCESSFUL SCRIPTS

The following approved scripts were developed by successful Field Leaders and need to be followed exactly as written. In this section you will see face to face scripts as well as telephone scripts.

Hot Market Text Message

Script for Sending Ahead to Qualified Hot Market

Script 1

Recruit:

Hey____,

I need your help with something important. I just got started working part-time in financial services. I'm getting my license with the state/province and I need to complete 6-10 training hours with my trainer before I can take my test. I put your name down as a reference for me. My trainer will be giving you a call. Please take his/her call, okay? His/her name is _____.

[RVP/Field Trainer name]

[Wait for answer]

Thanks! Talk to you later.

SUCCESSFUL SCRIPTS

The following approved scripts were developed by successful Field Leaders and need to be followed exactly as written. In this section you will see face to face scripts as well as telephone scripts.

Hot Market Telephone

Script for Setting a Field Training Appointment

Script 2

Trainer: Hi, my name is _____. I'm [Recruit's name]'s trainer. Did [Recruit's name] send you a text to let you know I'd be calling? Great. [New Recruit's name] is working with us on a part-time basis to supplement his/her income and he/she put you down as a reference because you have a lot of credibility. Do you have a few minutes so I can ask you a few questions about ____?

How long have you known ____? What are some good character traits about ____?
Would you hire him/her if you owned a business? Would you say that ____ has character and integrity?
On a scale from 1-10, how good is he/she with people?

That's good to hear. Thank you for answering those questions. Last thing, [Recruit's name] has to complete 10 training presentations before he/she can get his/her license with the state/province. He/she told me they have enough credibility with you and your spouse that you would give him/her 60 minutes of your time on Zoom and help him/her complete one of his/her training presentations. Is that true?

Excellent! [Recruit's name]'s training entails us doing a Zoom appointment with you and (spouse/significant other). It's very important that both you and your spouse are there for the appointment to help ____ learn. ____ will not get credit for his/her training if both you and your spouse are not there. You'll both need to be at home and settled with your camera on, not out and about, okay? Great. So let's schedule a time that will work for both of you. Are you usually together during the day or evenings? Weekdays or weekends? We're available to train __ on __day or __day. Which is better? And I have __time or __time. Which can you commit to?

Okay, thank you so much for helping [Recruit's name] with his/her training. It's really important to him/her. Now, something that [Recruit's name] said about you when he/she put you down as a reference is that you have a lot of integrity and if you give your word to be somewhere, that you'll absolutely be there. Is that true? So with that being said, can you mark that on your calendar and can we consider this a confirmed & definite appointment? Thank you. ____ will send you a reminder as well as the Zoom link for his/her training appointment. We'll see you then!

SUCCESSFUL SCRIPTS

Hot Market Text Message

Script for Someone You Know Who Wants a Better Career/Life

Script 3

Hey_____,

I need your help with something important. I just added a new income stream working in financial services. I'm getting my license with the state/province and I need to complete 6-10 training hours with my trainer before I can take my test. Will you and _____ help me? I just need you to log into Zoom while you're at home and settled, camera on and listen/ask questions to help me learn, ok? It's time-sensitive and I need to get it scheduled this week so I can take my test. Will you help me?

[Wait for answer]

You're the best. Thank you! I'm training on Tuesday and Thursday. Which day can you do?

[Wait for answer]

Great! 6 p.m. or 8 p.m.?

[Wait for answer]

Perfect. Confirmed! I'll send you the Zoom link. Thanks again.

SUCCESSFUL SCRIPTS

Hot Market Telephone

Script for Couples (Married or live with significant other) Age 25-55, with children, employed & healthy

Script 4

[Hi, small talk, etc.]

The reason I'm calling is because I need your help. I just started working in a new career in financial services to supplement my income/expand my streams of income and I'm really excited about it. It will allow me to work from home but I have to complete training first. I'm in training to get my financial licenses with the state/province and part of my training is to witness 10-15 practice presentations with my trainer before I can take my state/province test. Would you and (Spouse's Name) help me and sit through a brief presentation on Zoom? I just need you to listen and ask questions to help me learn. Will you help me?

Okay, thanks for helping me with my training. When we log into Zoom, you'll both need to be at home and settled, able to pay full attention with your camera on, not out and about or driving, ok? Or I will not get credit for my training. That's really important. As far as logging into Zoom, what works best for you both? ___day or ___day? ___time or ___time? Can I count on you to be there?

Okay, I'm letting my trainer know we're confirmed for that time. Please, can you take a minute to mark it on your calendar and tell (Spouse's Name) as well. And please don't cancel, okay? I can't take my state/province test until I complete my training hours, so this is really important to me. I'll send you the Zoom link and password and I'll call you the morning of our meeting to remind you. Thanks again for helping me. I have to book some more appointments, so I'm going to go. But I'll talk to you soon!

SUCCESSFUL SCRIPTS

Hot Market Telephone or Text Message

Scripts for an Invitation to an Opportunity Meeting for Close Friends and Family

Script 5

Hey! I know you keep your options open when it comes to making income, so I have something I want you to see. I want to invite you to my new company's open house tonight. There are part-time and full-time opportunities to work from home and the compensation is amazing! I'm in the two-week licensing class happening right now. Are you available to log in to the Open House on Zoom today or tomorrow to get more info?

[Wait for answer]

Be sure to be on camera and able to really pay attention. I'll put you on the list.

Script 6

Hey! I know you keep your options open when it comes to additional streams of income, so I have something I want you to see. I'm in the two-week licensing class happening right now and I want to invite you to an open house on Zoom because I know it would be a good fit for you. Are you available to log in to the Open House on Zoom today or tomorrow to get more info?

[Wait for answer]

Be sure to be on camera, not driving or out and about and able to really pay attention. I'll put you on the list and let my Vice President know to look for your name.



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