



L.E.A.D.E.R.S.H.I.P. Essentials Emphasized

As you learn about the relationship between the manager and the agent, this section will emphasize the Leadership Essentials of define and own the problem, excel at using proper words, respect and know your company, share customer communications, harness your time, impress with first impressions and persist in being present, pleasant and positive.

Appointment Setting Script

The goal is to schedule the appointment and get off the phone. Do not prequalify, give rates, or give out any other policy information. A good metaphor to remember when you are on the phone setting appointments is that it is like a game of ping pong. If the prospect asks you a question or gives you an objection, you must address it briefly and then respond with another question to get the appointment set. If they ask a question and you don't respond with a follow-up question after addressing their concern, it is like catching the ping pong ball and the game is over. Your goal is to keep the game going long enough to set an appointment!

SNL's Recommend Appointment Setting Scripts

Is this (Insert first name here)? My name is (Insert your first name here). I'm getting back to you about your request to get information on the state approved final expense burial or cremation plans. I assume you remember filling out the request on (insert request source) and putting your favorite hobby down as (insert hobby here) (this is not always an option so skip it if it is not appropriate). Great, I'm the local field representative for these state approved plans and I'll be in your neighborhood tomorrow. Would it be better to get this information to you tomorrow morning or afternoon? Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

*****Special Note: If they say they don't remember, just say, "well I'm glad I have it written down here for the both of us" (chuckle, chuckle) and continue by saying, "Anyway, I'm the local field rep....." and continue with the script.



Common Objections and Answers

“What is this about?”

Again, the reason I’m getting back to you is to get you the information you requested about the state approved final expense burial and cremation plans. I’ll be in your neighborhood tomorrow and I wanted to at least get this information to you and be available for any questions you may have. Would tomorrow morning or afternoon be better for you?
Great, (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I’d like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?
My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

“Are you trying to sell something?”

“No, the purpose of getting back to you is to provide the information you requested about the state approved final expense burial and cremation plans. I’ll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?
Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I’d like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?
My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

“Why don’t you call me back at a later time?”

I would be glad to do that, but this will only take a moment to set up a day and time to get this information to you. I’ll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?

*****If they still won’t schedule, at least agree to a day and time to call them back. *****

If they do agree....continue with.....



Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

“Let me talk to my husband/wife”

That is not a problem at all. However, this will only take a few moments to confirm a day and a time and if it doesn't work for your spouse, just give me a call back and we can arrange a different time. Is that fair enough?

*****If they still won't schedule, at least agree to a day and time to call them back after they talk to their spouse. *****

If they do agree....continue with...

..

I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you? Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

“You are catching me at a bad time/I'm too busy.”

I understand that for sure. However, this will only take a few moments to set up a day and time. I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?

*****If they still won't schedule, at least agree to a day and time to call them back. *****

If they do agree....continue with.....



I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?
Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

"I am ok with making an appointment but wonder if you can call before you come by?"

I would love to do that, but I'd rather just stop by since I'll be in the neighborhood anyway. If you are not home for some reason, we can reschedule. But for now, let's just set up a day and a time and I'll be there. Is that fair enough?

*****If they still want you to call after that, agree to call them or leave your name and number with them, but still plan to show up unless they call you if something comes up.*****

If they do agree....continue with.....

I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?
Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

"I already have insurance."

That is great! Most of the people I meet with already do as well. My job is to just get you the information.

I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?
Great, would (insert two time choices here) work better?



Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

"Can you just mail it to me?"

I would love to do that. It would make my job so much easier. However, this information is personalized for each person so I just need to at least drop it off.

I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?

Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.

"Can you just drop it off at my door?"

I would love to do that. It would make my job so much easier. However, this information is personalized for each person and my company requires me to verify with you in person.

I'll be in your neighborhood tomorrow; would tomorrow morning or afternoon be better for you?

Great, would (insert two time choices here) work better?

Perfect! Are you still at (verify address)? And you said (day and time here)? I am putting you on my calendar now and I'd like to give you a chance to do the same.

Are you at a place where you can grab a pencil or pen really quick?

My name again is _____, and I look forward to meeting you (or the two of you) on _____. Thank you, (insert first name here) for your time.



Voice Mail Script

Hi, (prospect's first name). This is (insert your first name). I am getting back with you about your request for the new information. I'm the local field representative in your area. Please give me a quick call back to set up a time for delivery. Thanks (prospect's first name). Again, it's (insert your first name) and my number is (insert number). That number again is (insert number).

Text Script

Hey, (prospect's first name). This is (insert your first name). I am getting back to you about your request for the new information. I'm the local field representative and I'll be in your area on (insert day) so should I drop this off in the morning or the afternoon?

Email Script

Hey, (prospect's first name). This is (insert your first name). I am getting back to you about your request for the new information. I'm the local field representative and I'll be in your area on (insert day) so should I drop this off in the morning or the afternoon?

Bonus Tips

A 12-point follow-up system is critical

- Day One – 3 calls :: 1 text :: 1 email
- Day Two – 2 calls :: 1 text :: 1 email
- Day Three – 1 call :: 1 text :: 1 email

Leave one voice mail each day and plan to door knock unreachable leads. Here's why:

- 6 calls equals a 90% chance of contact
- Calling at different times per day can double your chances
- 80% of sales are made between the 5th and 12th contact
- Try calling from a different number if you haven't made contact

Summary for Setting Appointments

Setting an appointment on the phone is certainly a time-saving method instead of driving around. However, if you cannot set a phone appointment, it is imperative that you just stop by and try to see them face-to-face. We cannot write business over the phone anyways, so don't give up on a lead just because they were not willing to set an appointment on the phone. Be diligent in setting appointments and be persistent when they offer questions, objections and concern.

Be the best ping pong player you can be and you will win this appointment setting game!



Door Knocking Script

Door knocking can be a fearful proposition. However, if you just imagine yourself out and about making new friends, it can be way less intimidating. You have reason to be confident because you have a reason to be there. They either requested the information, came as a referral or you are just out visiting with the neighbors. No matter why you showed up, don't think of it as a "cold call". Create a warm atmosphere with a smile and people will at least listen to what you have to say.

Start by waving and looking at the house as you approach. You never know if they are already looking out the window or the door so by waving as you approach, they will assume that you saw them and it gives them more of a reason to open the door. You will also want to have a physical copy of the "lead card" no matter where the lead came from. This helps build credibility and establish trust. It is also a good idea to create a lanyard with a plastic sleeve with your picture on it that identifies you as a field agent. When you knock on the door, step back a few steps and wait for them to answer.

SNL's Recommend Door Knocking Script

Hi, (prospect's first name). My name is (insert first name). I know you weren't expecting me, but I am getting back with you about your request from (insert lead source request) for the state approved final expense burial and cremation plans. I am the local representative and we are the company approved by the state. I was in the neighborhood so I figured I would drop off the information and answer any questions you may have. Where is a good place for us to sit down and go over it? (Break eye contact and slowly start walking toward the door.)

You will either be welcomed in immediately, welcomed in with some hesitation or asked to go away. Handling objections at the door must be done by being positive and pleasant. It is not always easy to overcome an objection face-to-face when you are asking to go into someone's house. However, listen to the prospect as to why they will not let you in and do your best to get in the door.

Common Objections and Answers

"Can you just give me the information?"

I would love to do that. It would make my job so much easier. However, this information is personalized for each person and my company requires me to give you a custom quote. Where is a good place to sit down?



“I don’t have time right now.”

I know we are all busy. It will only take a few minutes and I am sure it will be very helpful for your family. Where is a good place to sit down?

“I don’t remember requesting it.”

I understand that. I’m glad I have it written down for both of us to remember. (chuckle, chuckle) (Show them the lead card.) Where is a good place for us to sit down?

“I already have insurance.”

That is great! Most of the people I meet with already do as well. My job is to just get you the information and answer questions. Where is a good place to sit down?

“Let me talk to my husband/wife”

That is not a problem at all. However, this will only take a few moments to go over. Can we go over it really quickly so I can at least check you two off my list? Where is a good place to sit down?

If they still say no, then set up an appointment for a later day and time.

“Are you trying to sell something?”

“No, the purpose of getting back to you is to provide the information you requested about the state approved final expense burial and cremation plans. My job is just to go over the information and answer any questions you may have. Where is a good place to sit down?”

If they will still not let you into their house after you have tried to overcome objections, make an attempt to set up a solid appointment within the next three days if possible.

Summary for Door Knocking

Be positive, persistent and pleasurable when dealing with prospects face-to-face at their door. Don’t be pushy trying to get into someone’s house. Smile. Smile. Smile. Did we mention smile?! You will most likely only have 1, maybe 2 opportunities to overcome an objection before you are considered too pushy and rude. Use as much common sense and self-awareness as possible to determine how the prospect is perceiving you. You at least want to have the opportunity to set up an appointment for a later date.

Knock. Knock. Who’s there? (You fill in the rest!)