

## **Sample Appointment Setting Scripts**

### **Generic Appointment setting script**

*Hi, this is Your Name I proudly represent Mutual of Omaha in your area. Our office contacted you and I need to stop by to introduce myself...get you the updated information, do a review and answer your questions.*

*I can help you and your family. (Confirm address to meet) I am going to be over your way on Tuesday is morning or afternoon better for you.*

### **Alternate Appointment setting script**

*Good (Evening, Afternoon, Morning), I'm looking for (lead's first name). This is (your name), I represent \_\_\_\_\_ in your area and you recently expressed an interest in information on life insurance, looks like you gave your \_\_\_\_\_ as \_\_\_\_\_.*

*(Depending on the lead ... a memory jogger may be beneficiary, Amount of Mortgage, Medicare supp provider, Favorite Color...If they don't remember, remind them of their info)*

*Now, I'm going to be in your area on \_\_\_\_\_. Are you more of a morning or an afternoon person? Okay, would you prefer I swing by around \_\_\_\_\_ or \_\_\_\_\_? Are you still at \_\_\_\_\_? (Or what is your correct address?)*

*Do I need any special directions? Will my GPS get me there? I'm adding this to my calendar right now. Please add this to yours as well. Have a great night, thanks for your time. We will see you \_\_\_\_\_ @ \_\_\_\_\_.*

***First response to any objections....Main Objections: "Burial is paid for, we're covered, have insurance, etc."***

***Great, that's exactly why I need to see you...***

## **UA No First Pear Premium Accidental Death Initial Scripts...**

- **At Appointments**

"Hello, how are you doing today? Awesome. You have been very nice to me so here is my chance to repay you. One of the Companies I work with has come up with a No-Cost Accidental Death Policy that I am able to give to people that I know. Take a minute and fill this out here. As you can see there is no financial info asked. This is good for you, your spouse and your children up to age 21. Next year you will receive a notice if you would like to renew the entire program at \$10 for the year for the whole family again, if not just ignore the notice. It's that easy! This should take a week or so to get issued.

While smiling say "I really enjoyed working with you today, and I am authorized to allow you to sponsor 6 close friends or family members that live locally for the same accidental death benefit program that I shared with you. (pause) Who would you like to start with? .....

- **At the door script**

1. Hello. Is this (first name)? This is (Your first name). How are you doing today? Awesome, I am doing great myself. I'm the person that sent you the: (Birthday Card, The Letter, Left a card at your house, etc.)I'd like to get your opinion on a new program that one of my companies came out with, AND I have a gift for you and your spouse with no-charge to you, just as a Thank You. It's an Accidental Death Benefit Policy at no charge. May I come in, (look down and shuffle your way in)

This can be used anytime when at a door unexpected.

- **Script for the telephone**

2. Hello. Is this (first name)? This is (Your first name). How are you doing today? Awesome, I am doing great myself. Just a quick call, to see how you are doing! Have you needed to use the policy we put in place? I would like to get your opinion on a new program that one of my companies came out with. Just for meeting together, I have a no-cost Accidental Death Benefit Policy at no charge for the two of you. Could we meet???

Give two dates or times (A choice close)

Practice this so that you do not even have to think about it to say it.