

BASIC PHONE SCRIPT

TIPS FOR GETTING STARTED:

*The key to making this work is your tonality and posture. Remain **low and slow**. Pretend you are a plumber or furnace repair guy and think about what they sound like when they call you to fix your problem... **MENTALITY:** This isn't expensive, I'm not going to take much of your time, and I don't care if you get it or not. It's just my job to review with you.*

Hello **(client name)**, this is **(your name)**. I am calling about the request you sent in to us on your loan with **(name of bank/financial institution)**. It's about the mortgage life and disability coverage.

The reason I am calling is I am the person that goes over the information and options with you. My company has me dispatched to your territory next **(day(s) you're in their area)**. This only takes about 20 to 30 minutes. Do you work during the day? I am calling to find out what time of day works best for you and **(spouse's name, if applicable)**, mornings, afternoons, or evenings? Now, when you say evenings, are you saying closer to 5:30 PM or 8:00 PM? Is that the same for both of you?

Great, I will put you down for **(time)**. Could you please get something to write on? Please write down my name, **(your name)**, to go over your mortgage protection options on **(date and time)**.

Now, I have your address at **(verbalize the address info found on your lead)**, is that correct? What is the nearest cross street? Great, now **(client name)**, I need to ask you one more question. Not everyone qualifies for all of the plans that we offer because of pre-existing medical conditions. Is there anything I should know about the health of you or **(spouse's name, if applicable)** that may not allow you to qualify? Are you on any medication? Have you had any major operations in the last 20 years?

Ok then, I will see you on **(date and time)**!