

Internet Lead Phone Script

Hey _____, Hey this is Mike Curry getting back to you from the benefits center about that form you sent in requesting that final expense or life insurance info.

(take a breath, no pause)

I'm actually just the field underwriter that's been assigned to get this out there to you.

(take a breath, no pause)

It's pretty simple, all they do is just send me out to ask you a few eligibility questions and let you know what you qualify for.

(take a breath, no pause)

And I'm actually gonna be dispatched out there in your area tomorrow & _____, it takes about 10/15 min to run through the info. Are you still working or are you retired now? (If working, what's the latest you usually get off work?) (If retired, are you more of a morning person or afternoon?)

Great, and you're still at (verify address), is that an old address or current? (House, Apt, or Mobile Home)

And for your security, I've got your DOB as____?

Perfect, well just a heads up, I'll be driving a black Chevy truck, I'm 6', and I'll have a name tag on with my license number that I can verify with you at the door.

(Client) I look forward to meeting you and helping you and I'll see you tomorrow/day after at (remind of time)