Script 1: Aged Insurance Leads

☐ Key Engagement Points

Customer: Hello

Agent: Hi Bob it's (Agent Name), I'm sorry it took so long to get back to you.

We are running really behind due to the high amount of requests.

You had reached out to me a while back in regards to the new state regulated life insurance plans that may be available to you.

I have the information to get out to you I just want to confirm 2 things real fast and I'll let you go.

Is your address stil 1234 Abby st.? Great!

And when you originally filled this out you put your d.o.b. Was April 17 1966 is that correct?

And the spelling of your last name is jones?

Ok so I am a state licensed underwriter and my job is to see what you qualify for.

I'm assuming you know it's state regulated so this is standard routine.

They have me come out for a few minutes to meet and verify that you are who you are and nobody is getting this information in your name.

Also there are no medical exams or tests, we just need to make sure your not in a hospital or on life support or anything like that.

They have me dispatched in your neighborhood today and tomorrow.

I'm all booked today, but tomorrow I have an 11 am if that works for you?

Ok great. Can you grab a pen and your appointment book or paper? Let me know when your ready.

Write down my name is Laz. 11am tomorrow Your confirmation number is 7030 for my safety.

When I get there is it an apartment or house? Is the number on the house ? What color is it.

I am tall skinny with a beard so you know it's me when I arrive and I have a black pick up truck.

Have a great day and look forward to seeing you tomorrow at 11 am.