<u>Life Insurance Lead Script</u>

Hi, this is …….. With US Life. How are you?

I'm calling to let you know of a new Life Insurance plan that has just been approved in your state **<<STATE ON DIALER>>.** Our local agent can give you a callback in a few days and give you more information.

Would you be interested in learning more about this new "LIFE" insurance plan? If YES Continue *(If Not interested /YES Insurance One Rebuttal allowed)*

1. How old are you? (Check the age criteria from comment box)
2. What's a suitable time to call you back? (morning's , evening's, afternoon's)
3. What coverage plan would you like to get information on like 50, 100, or 200,000 coverage plan?
4. Who would be the beneficiary after you like any of your relatives? (such as a spouse, son or daughter)
5. For the reference of the next call, may I ask you, what is your favorite color?
6. 6. Will this information on Life Insurance be just for you or your spouse as well?
7. 7. How old is your spouse?

Our local agent is an expert on this new plan and he will provide you with a quote and help you to better understand how this affordable plan can benefit you and your family. Please remember to expect a callback from <<AGENT NAME>> within the next few days about this Life Insurance plan. Have a wonderful day.

NOTE: Confirm the Full Name, Address, Appt # and Phone No of the Customer before closing the Call.

QUESTIONS/REBUTTALS

WHERE ARE YOU LOCATED? (CX ASK WHERE THE AGENT IS LOCATED/YOU)

We're located in Florida; however we have 3000 insurance agents across the country that helps individuals like yourself find an option for low cost Life Insurance

NOT INTERESTED REBUTTAL (CX SAYS NOT INTERESTED/CAN'T DO IT RIGHT NOW ok but before you go these new affordable plans has just been approved in your state and almost everyone qualifies. Our agent (agent name) can give you a callback and give you more information would that be ok?

NOT RIGHT NOW REBUTTAL (CX SAYS THEY CAN'T TALK RIGHT NOW/DO IT RIGHT NOW) oh no, this is not for right now the agent will call you back within the next few days to review your options with you would that be ok?

ALREADY HAVE INSURANCE (Cx Says they have Insurance)

well, It's good to be ahead however all of our clients feel that every dollar is important these days. We would like show you some comparable plan that could save money and assure you that you are getting the best value for your dollar. Our agent (agent name) can give you a callback with more information would that be ok?

HOW DID YOU GET MY # (CX ASK HOW YOU GOT THEIR # INFO

We usually get your information from online requests or senior databases

MAIL? (CX ASK TO MAIL THEM SOMETHING)

Unfortunately, I won't be able to do that but when the agent will call you back they will provide you with all the information you need.

WHERE CALLING FROM?(Cx Ask where YOU ARE CALLING FROM)

Senior Benefits, we're a division of US life

WHAT IS FINAL EXPENSE INS. (EXPLAIN THE INSURANCE IN MORE DETAIL)

Final expense is a life insurance policy that covers burial expense and any other debts or obligations you may have.

HOW MUCH WILL IT COST? (Cx asks about cost..)

The policies are inexpensive and have only small monthly premiums. We'd love to set up a time for a specialist to call you back with the specifics.

NO INCOME/NO MONEY (Cx says they can't afford etc..)

I understand, that is the GREAT thing about this plan for many people it may cost less than $1 per day, do you think with your current budget you could afford that.

HEALTH PROBLEM (CX SAYS THEY HAVE HEALTH PROBLEMS OR THEY CAN'T GET INSURANCE) I'm sorry about that But that is ok, this new plan is approved to cover everyone regardless of Health conditions

OFFSCRIPT (FOR QUESTIONS YOU CAN'T ANSWER)

My only job is to schedule a callback with one of our specialist so they'll be the better person to answer any questions you have

Life Insurance Qualified Lead Criteria

- In order for a lead to be qualified the customer must be between the age criteria.

- Address of the customer should be properly verified.
- Any questions which are not in the script if asked Lead will be considered Rejected.
- Any off topic discussions with the customer Lead will be considered rejected.
- Any Other language then English in the call, lead will be considered rejected.
- All Questions should be asked clearly Customers age must be asked instead of verification otherwise lead will be considered rejected.
- More than one rebuttal will take the lead to rejection in any scenario.
- Customer must be aware of the Call back agents name.
- Customer Full name should be properly asked.
- Any Promising statement will make the lead rejected.
- The script needs to be followed very closely. Getting far away from the script will cause the lead to be disqualified.
- All questions are compulsory.