Final Expense Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] with [Company Name]. How are you today?

[Pause for response.]

I'm calling because you recently expressed interest in **Final Expense Insurance**—a life insurance plan designed to cover funeral expenses. We have a **low-cost plan** recently approved in your state. I'd love to provide more details and help you find the best coverage option.

Before we proceed, I'd like to ask you a few quick questions to ensure we're offering the best plan for you.

Information Gathering (For All Scenarios)

1. **Full Name**:
   - Could you please confirm your full name?
2. **Date of Birth**:
   - May I ask your date of birth to ensure you qualify for the plan?
3. **Address**:
   - Can I please confirm your address to ensure we have the correct location for this plan?
4. **Beneficiary**:
   - Who would be the beneficiary of this policy (spouse, child, etc.)?
5. **Coverage Amount**:
   - What coverage amount are you interested in? ($5,000, $10,000, $20,000)
6. **Smoker or Non-Smoker**:
   - Are you currently a smoker or a non-smoker?
7. **Active Checking or Savings Account**:
   - Do you have an active checking or savings account where payments can be made from?

1. Callback Lead Handling:

Step 1: Confirm Interest

- Are you still interested in learning more about this Final Expense Insurance plan?

Step 2: Schedule a Callback

- When would be the best time for our agent to call you back to review your options? We can schedule it for:
    - **Morning**
    - **Afternoon**
    - **Evening**

Step 3: Verify Details

- I just want to confirm the details so we can schedule your callback:
    - **Full Name**:
    - **Date of Birth**:
    - **Address**:
    - **Beneficiary**:
    - **Coverage Plan**:
    - **Smoker/Non-Smoker Status**:
    - **Checking/Savings Account**:

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] on [Scheduled Time]. Please expect the call, and thank you for your time!

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2. In-Person Appointment Handling:

Step 1: Build Interest for In-Person

- If you prefer, we can set up an in-person meeting with one of our agents to go over the plan in detail and help you select the best option. Does that sound good?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
    - **Option 1**: [Date/Time]
    - **Option 2**: [Date/Time]

Step 3: Verify Details

- Let's go over your information to ensure everything is set for the meeting:
  - **Full Name**:
  - **Date of Birth**:
  - **Address**:
  - **Beneficiary**:
  - **Coverage Plan**:
  - **Smoker/Non-Smoker Status**:
  - **Checking/Savings Account**:

Step 4: Confirm Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. They'll provide all the details you need to make the right choice.

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3. Live Transfer Handling:

Step 1: Live Transfer Introduction

- I can transfer you to a specialist right now who can walk you through the final expense plan in more detail. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
  - **Full Name**:
  - **Date of Birth**:
  - **Address**:
  - **Beneficiary**:
  - **Coverage Plan**:
  - **Smoker/Non-Smoker Status**:
  - **Checking/Savings Account**:

Step 3: Initiate the Transfer

- Perfect! I'll transfer you now to [Agent Name], who will guide you through the process and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested**:

  "I understand. However, this plan has helped many people like yourself secure affordable coverage. Would it be okay if our agent calls you back to provide more information?"

- **Already Have Insurance**:

  "That's great! Many of our clients already had coverage, but found this plan offers better value. Would you be interested in exploring your options?"

- **Can't Afford Right Now**:

  "I understand, and that's what makes this plan great—it starts at just $1 a day. Could we set up a quick callback to go over the details?"

- **How Did You Get My Information?**:

  "We usually receive information through online requests or from senior databases."

Final Confirmation (For All Scenarios)

Before ending the conversation, always confirm the following details:

1. Full Name
2. Date of Birth
3. Address
4. Beneficiary
5. Coverage Plan
6. Smoker/Non-Smoker Status
7. Active Checking or Savings Account
8. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement:

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best final expense plan to protect your family. If you have any questions, feel free to reach out to us at [Phone Number]. Have a great day!