

PHONE SCRIPT

“Hey John” This is not a question, assume the person who filled out the form is answering.

“Hey this is Kyle with the Benefit Office, _____ county. Giving you a call back to let you know we got this form that you sent in about the state-regulated life insurance programs. I’m the person in charge of getting this information back to you.”

Wait for response. If they ask “What is this about?” “I don’t remember.” “Who are you?” Etc, repeat the previous statement again. Wait for acknowledgment.

“You put your birthday on here as _____, is that correct?”

Wait for a “yes”

“Ok and your address as _____?”

Wait for a “yes”

“Ok cool, are you working, retired, or drawing disability?”

Wait for answer and write it down.

“So how these programs work is they’re all non-medical, so there’s no physical exam, no bloodwork. They just make me get out there and verify that you’re a real person and you’re not hooked up to a hospital bed.”

Wait for an acknowledgment, laughter or an “ok”

From here we have two routes to go: retired/disability or working

ROUTE 1: They are retired or drawing disability. Give them your next open timeslot.

“They’ve got me delivering information to about 20 people tomorrow. They have you on my schedule at _____, so I just wanted to make sure you’ll be home around then?”

Wait for response. If that time doesn't work (doctor appointment, picking up grandkids, etc) give them another time for that SAME day. Don't allow them to control your schedule and pick a different day. You already told them the day you'll be delivering information in their area.

ROUTE 2: They are working. Get their schedule and give them a time outside of that.

“They’ve got me delivering information to about 20 people tomorrow. What time do you work tomorrow?”

Example: I work 8-5.

“Ok cool, I have a small window that I can squeeze you in around 6pm. You’re home by then right?”

Wait for a “yes”

Don't forget to tie down the appointment

“Ok _____, I’ve got you down at 6pm tomorrow. I’ll be in a _____ car and I’ll have this form you filled out so that you know it’s me. Are you house numbers on the mailbox or the house, somewhere I’ll be able to see them?”

“Perfect. I’ll see you tomorrow around 6pm.”

A good phone call will result in the client saying “thank you”. Never thank the client. You are helping them out by getting the information they requested back to them. They are not helping you out by giving you an appointment. This establishes control before you even get there.