

LIVE LIFE LEAD SCRIPT & Manual

What is Burial Insurance: Burial Insurance is a small Whole Life Insurance policy. Usually between \$5,000 - \$15,000 in coverage. It is designed to simply pay for the cost of a funeral. The rates never go up and the coverage never goes down.

Goals: Each call has a couple of specific goals:

1. To determine an interest in Burial Insurance.
2. If there is an interest, then to confirm the client information.

These are the two most important pieces of the call. If the client does not understand that this call is about Burial Insurance then even with an agreement to have the agent call back, this is not a lead.

Leads: A lead is created when you (the telemarketer) create an agreement with the prospect to have a **Burial Insurance Specialist** call them back for the purpose of discussing their Burial Insurance options. Again, if a client is not sure what you're talking about but says "Yeah, sure. Call me tomorrow" this is not a lead.

The Script: The script should be followed to the letter. It is important that all phrasing and prepositions be kept the same as what is written below. The parts with <<>> are where you will insert the information from the data you are provided with the call. For example: “just been approved in <<insert state here>>” would be read “just been approved in California” or whatever state you are calling on. Parentheses () are my simple notes on why this part is important and how it should be handled.

<<Ask for the prospect by name:>> (The names is very important to try and get right the first time. If you mispronounce someone’s name they already assume you are some sort of telemarketer and are on the defensive immediately. I would recommend using Mr. or Mrs. and just the last name. Example “Mr. Jones or Mrs. Smith).

Hello <<Name>> please...

Hi <<Name>> this is <<Your Name>> calling from the **Senior Benefits Agency**. How are you doing today? (Pause and let them answer. Listen to what they say and respond accordingly. Example: “Great” for good or “I’m sorry to hear that” for bad)

Great, well we are calling today to make you aware of a new, low cost, **Burial Insurance Plan** that has just been approved in <<insert state here>> and is designed to cover **100%** of your **Funeral Expenses**. As I’m sure you’re aware, Social Security only pays \$255 dollars toward **Funeral Expenses**.

The good news is <<Agent Name>>, who is a **Burial Insurance Specialist** is available to go over your options with you tomorrow. **The information is FREE**. What would be a good time for Mr/s. <<Agent’s Last Name>> to call?

<<Set time>>

Ok. So Mr/s. <<Agent’s Last Name>> will call you tomorrow around <<TIME>>. Let me just confirm the information we have for you real quick.

Are you still located at <<Address>>?

And you are <<Age>> years young, correct?

And finally, will this FREE information be just for you or you and your spouse?

That is all. Thank you very much for your time and again, **Burial Insurance Specialist** <<Agent Name>> will be calling you tomorrow around <<Time>>. Take care and have a great rest of your day. Good Bye.

Questions and Objections:

The easiest way to handle any question is to simply say: “That’s a great question and I will make a note here to make sure that your Specialist answers that for you.” Then actually make a note for the specialist. You can always simply state that you are only the appointment setter and the expert will have the answers to all their concerns.

What if the client states they already have coverage? “That’s great that you already have that taken care of. This information here is free. Would you like to make sure you are not paying too much?”

What if someone else (a son, brother, spouse, etc) is handling the Final Planning for the prospect? Scheduling a call time with an authorized individual would still be considered a valid lead. Just be sure to leave quality notes as to who is handling this for the prospect.

If the client says they can’t afford anything or that they are not looking to buy anything, but are still interested in talking to a Specialist and they are clear that it is about Burial Insurance, this would still be considered a valid lead.

Where are you located? “We are based out of Hemet California. But we have Specialist available across the country.”

What’s the name of your company? “Senior Benefits Agency, we are a division of PHR Insurance based out of Hemet California.”