

Script for Final Expense Appointments

Hello may I speak to _____? (**Say Their First Name**)

(**Say Their First Name**)_____ my name is (**Your Name**). The reason I'm calling is because one of my assistants _____had spoken with you and told you I would be giving you a call back to talk about the life insurance to cover funeral expenses. You had told them your favorite colour was_____.

What I need to do is to simply verify a little information that you left us.

Would that be ok?

Now; I have your address as _____. Is this your correct address?
Great!

I see that your age is _____. Correct?

We show that you are in Good Health. Is this correct?

OR (whatever is applicable)

Ok , now was this information just for you or do you have someone else you would like to get information for. (if someone else as well, collect info)

Ok, Great, what we do it set up 30 min time periods when we are going to be in your area and show you the different options that are available t you.

Now; I will be in your area tomorrow at _____(time) or would _____(time) be better for you?

Ok. Great so I'll see you at _____ to go over what an average funeral costs are and what life insurance options are available to you. Of course; you are under no obligation whatsoever.

(Note: If there is a spouse or other family members; make sure that they are there. Do not set an appointment with out the spouse being there if at all possible.)

(NOTE: IF THE CUSTOMER OBJECTS TO THE APPOINTMENT BY SAYINGJUST SEND A BROCHURE IN THE MAIL....)

Respond by saying.... I do not have any brochures that I can send. I'm a contracted field underwriter that just does the medical questionnaires and explains the information. In fact when I do come out; I show my field underwriter credentials to prove who I say I am.

So; would _____(time) tomorrow or _____(time) be better for you?

MAKE SURE SPOUSE WILL BE THERE!

Great! Then; I will put you down for tomorrow at _____(time).

(SPECIAL NOTE: IF THE CUSTOMER OBJECTS TO THE APPOINTMENT REBUTTAL NUMBER 1 SAY THIS....)

I can certainly understand but it only takes a few minutes of your time.

I'm not coming to make you feel uncomfortable or to ask you for money. I'm simply coming to present the information to you. After you see what we have to offer; it will be up to you as to whether or not we go any further in the discussion. Fair enough? Therefore; would tomorrow at _____(time) or would _____ (time) be better for you?

(SPECIAL NOTE: IF THE CUSTOMER OBJECTS TO THE APPOINTMENT A SECOND TIME USE REBUTTAL NUMBER 2 SAY THIS...)

I can understand how you feel... but, our company requires that we must see everyone that has inquired about our insurance. We must go over the information with you in person. Besides; it only takes about 10 to 15 minutes of your time. You may see something that you like. And, of course; you are under no obligation whatsoever. If your not interested; we would have done our job and be on our way. Is that ok?

So; would _____(time) tomorrow or would _____(time) be better for you?

NOTE: AFTER SECURING THE APPOINTMENT CLOSE THE CONVERSATION IN THIS WAY.....

Ok! Do you have a pen and paper available? I will wait on you. I want you to write down my name so that you will know who is calling on you.

My name is _____. I will be driving a _____ car. **(GIVE THE COLOR OF YOUR CAR ALSO)**

Now; **(SAY THEIR NAME)** I will look forward to seeing you tomorrow at _____(time). I hope you have a great evening and I look forward to meeting you!

(HANG UP LAST. IT'S MORE PROFESSIONAL)