

Insurance Wholesalers Phone Script

Hello, (*call by first name*) _____? (*Pause*)

(*First name*) _____, this is (*your name*), you sent in a request for mortgage protection information on your (*Lender Name*) loan, you do remember sending that in? (*Pause*) (Wait for a “yes” reply! If reply is no, say, “This is the program that would take care of the mortgage if something happened to you.” Go over information until they remember.)

Great, I did receive it in the office and I’m going to be out in the _____ area on a number of appointments (*Mon/Tues, Tues/Wed, Wed/Thurs*) of (*this week, next week, this coming week*)and **I need** to set up a time to get together with you and go over the information. It’s about a 15-20 minute get together based on the info you sent in. Which day works best, (*Tuesday*) or (*Wednesday*)? (*Pause*)

Great I have an opening at (5 or 6, 6 or 7, etc.). Which time works better for you? OK, (*time*) will be fine. I’ve got it in the book for (*day, the __ at time*) and if you would mark it down somewhere as well, I’ll see you (*or you guys*) on (*day and time*). And you’re at (*verify address off the lead*). Great. See you (*you guys*) on (*day and time*). Bye.

Important Phone Requirements

Call leads immediately. Time is important. Try to be the first caller and get an appointment and sale before they get other calls. Give the feeling that you will take care of this for them.

Call in the morning between 9am and 12pm, especially on Saturday. Also try Sunday evenings. If you are not able to reach them on Saturday or Sunday, try again any following afternoon or evening. Try to get 12-15 appointments a week. Make appointments on the hour to eliminate down time in the event of a no show. If you are making sales and are running behind on your schedule, you can always reschedule one appointment to another time. Remember, the phone is where you need to spend time getting those appointments. Once you have 12-15 appointments, you just need to follow the presentation to be successful.