



## Phone Approach (Face to Face)

**I think we all agree that a Lead is only as good as the Agent working it. With that in mind it is important that you have an outstanding Phone Approach (script) which has been proven to work time and time again.**

Remember your goal – **Set The Appointment**

### **Here is a script Spike recommends:**

Ring, Ring... Hello is this \_\_\_\_\_? (reference the name on the Lead)...

\_\_\_\_\_ my name is \_\_\_\_\_ and I am following up a call you received the other day from someone in our home office about affordable health insurance... **I am sure you remember the call** (pause) Do you have a moment to speak now or did I reach you at a bad time?

### **If they consent, proceed... (if not, set up mutually convenient call back time)**

\_\_\_\_\_ I am working in your area this week and would love the opportunity to help you,... would Thursday at 9:00 am be best or would you prefer the afternoon at 1:00?

Set the Appointment!

### **Transition to Qualifying and Pre Close—**

Now \_\_\_\_\_ “so that I can come prepared” let me verify some information...

(Verify all info on the lead asking questions with tie downs)

Example:

*“John it says here your address is 101 South Main St, Joliet, Il, is that correct? Great John... And your date of birth is 01/01/1960... is that also accurate?” Super!*

**Great \_\_\_\_\_ it looks like we can definitely help you!!!**

In closing, so that we are both on the same page, when we meet I would like to review your current coverage and premium... show you several choices and options, comparing apple to apple...

All I ask is that if we can improve your coverage, lower your premium OR BOTH you give me the opportunity to earn your business...FAIR ENOUGH?

Great \_\_\_\_\_ see you then!