Telesales Phone Script (Direct Mail Lead)

Hello, (first name only, ie James)

James, this is (your first name) calling about your mortgage. (Awhile back,) You sent in a letter/form to us about protecting you and your family in case of an unexpected death or disability, do you remember that? (Do not move on until they remember)

I have a couple of quick questions to see if I can do anything for you:

1) It says here you are 58 years old (or whatever it says; **verify** what they completed.)
2) Do you smoke or use any tobacco? Any plans to start?
3) Are you currently taking any medications? What for? (now you're filling out the client qualification form)
4) Any major health problems in the past like cancer, heart problems or stroke?
5) Have you been diagnosed with Covid?
6) What's your approximate height and weight?
7) What do you do for work?
8) Anyone else living in the home with you?
9) How long did you finance the house for? What's the approximate monthly payment?

James, one last question for you, and this really helps me know how to help you best: What were you looking for this coverage (male)/ protection (female) to do for you? (Write this down, this is the GOLD! – use this in the appointment to help you close)

Okay, I can definitely help with that.

What time do you (and your spouse) get home from work? Most homeowners I am going over what I find over Zoom, are you familiar with it? I am seeing several other homeowners on Zoom Monday and Tuesday (or whatever days you're setting up for), which would be better for you? I have _____(time) or _____ (time), what's best?

I'm going to send you a Zoom link, what's the best email address to send it to? On Monday(or whatever day appointments is) at, what time did we say? Okay, at ____(time) all you'll have to do is click the link and we will join together and I'll see what I can do to help you. I look forward to meeting you then. Have a great rest of your day and see you _____(day) at _____(time)