

## Internet Lead Phone Script

Hello, (Client Name)

My name is \_\_\_\_\_ and I'm getting back to you about the form you filled out on the internet for information on life insurance protection.

(Client Name), I've been assigned to get the information out to you but just need to verify what you put down. (No Pause) You put down your DOB as \_\_\_\_\_?

Okay, and are you a smoker or nonsmoker? Married or single?

Perfect, my job for you is simple. We work with a variety of companies, so my job is to get the different options out to you and verify you are alive and breathing, as the plans are nonmedical, meaning no blood and no urine.

We are running behind, so this'll be quick, but I need to put down some notes.

Are you working or retired?

(If working) What time are you typically back in the door from work?

Perfect, I will have about 5 minutes and can get you in between appointments either at \_\_\_\_\_ or \_\_\_\_\_. What time is better?

Okay, I will put you down then and I'll have about 15 appointments booked that day, so if you could give me a window between \_\_\_\_\_ and \_\_\_\_\_, I know I'll probably need it.

Okay perfect, and I have your address at \_\_\_\_\_, is that correct?

Great... Well (Client Name) I have you scheduled on \_\_\_\_\_ at \_\_\_\_\_ and I look forward to meeting you and helping you. I will see you then. Have a great day.