

Online Leads B.E.S.T. Script

You Have a New Online Life Insurance Lead That Needs a Call ASAP!

The client below has provided and confirmed the following information and has requested an agent call them for further information regarding life insurance coverage within 24 hours. These individuals completed an online form requesting more information.

How was this lead generated?

Through paid search and banner ads, the potential customer was directed to a webpage where they requested information on life insurance products. Through this process, the prospect also identified the type of policy and coverage amount they are interested in. The phone number has been validated prior to our allocation.

B.E.S.T Script for Online Leads

Be Busy

Pick up the phone! This is a simple numbers game, so the more dials you make, the more appointments you can set and the more families you can help. Most successful agents make about 250+ calls a week.

Establish the Reason You're Calling

Use this template during your call.

Hello, my name is _____. You went online and requested some information for life insurance. I am the field underwriter here in (city or county) assigned to help you, and I just have a couple questions. You indicated online that... [start filling out client qualification form].

I don't remember doing that.

That's exactly why I'm calling! You (or your spouse) went online to request a quote on life insurance. It will just take a few moments and I'll get those quotes out to you... [Back to script]

I still don't remember doing that.

It must have been your spouse who requested this, so if you wouldn't mind, let them know that we will them a call back and will be in touch later. Thank you for your time.

Call me back.

I have a stack full of clients who have requested information, so I'm not set up for callbacks at this time. I only have about 10 seconds to verify this information...

1. Your date of birth is _____, your height is _____, and your weight is _____.
2. Your street address is _____, _____, _____, _____ (Street, City, State, Zip).
3. You indicated that you don't use tobacco products in any form, is that correct?
Do you plan on starting using any tobacco products?
4. Now, are you married? (Yes/No) [skip to question 6 if "No"]

5. What is your spouse's name and DOB?
Height and weight?
Does he/she use any tobacco products?
6. Do you or (spouse) have any medical problems that I need to know about? Such as HBP, diabetes, cancer, heart attack, high cholesterol, COPD, etc.?
7. Are you or (spouse) currently taking any medication?
Have either of you been admitted to the hospital in the past 10 years?
8. What do you do for work?
What about (spouse)?
9. On the form you submitted, it says the amount of coverage you would like is \$_____, is this correct? With a policy length of _____, is that right?
10. Most importantly, when you requested a quote online, who were you looking to protect?
Was it mostly for coverage on you, (spouse), or both?

Set Appointment

I will be in your area tomorrow, and I have some time available to meet with you and discuss what coverage you will qualify for. It should only take about 15 minutes. I can squeeze you in at _____ or _____. What works best for you? (and spouse, when you'll both be home?)

So, I'm going to hold that spot for you (and spouse). Are you positive this time will work for (both of) you?
[get definite answer or select new times]

I need to check with spouse.

Let's do this, let's find a time that you know is good for you, and you think will work for (him/her). I'll hold the spot, then you can check with (him/her) and let me know if anything changes. Assuming this time works for your spouse, is _____ a good time for you?

No.

[go back to date/time discussion]

Unsure still.

I am meeting with 10-15 people that day, so if you aren't sure, let's find another time that works best for you (and spouse) [back to date and time discussion].

Tie Down

Can you grab something to write with? Great, I need you to write down a few things that you'll need to have out when I arrive. This will help speed up the process.

1. I need your Doctor's name/address/phone # for both you (and spouse). (Spouse) will be there for the appointment, right?
2. I need any medications that either of you are taking out on the table, if you don't mind.

3. I'll need a picture ID for both of you. A driver's license is fine.

That should be all I need. So, we are meeting at _____, correct? Ok, if you could write down that time at the top of your paper, as I will be there at _____. Please give me a 15 or 20-minute window on either side of that time, since I'll be meeting with other homeowners in your area too. If I plug your address into my GPS, will it take me right to your home? See you tomorrow!

Key Thoughts on Booking

- Posture: the person who is in control wins.
- The person who is asking the questions is in control.
- Avoid "weak" language like "is that okay?"
- Ask for who answers the phone.