

You have a NEW Life Insurance LEAD that needs a call ASAP!

EXAMPLE SFG WEBSITE LIFE LEAD

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 on the SFG Life Website requesting more information.

How was this lead generated?

Through paid search and banner ads, the potential consumer was directed to the SFG Request a Quote 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. They were then contacted and confirmed by SFG Corporate support staff.

After verifying the information provided below the staff member explained that they should be hearing from their local agent within 24 hours. So it's imperative that you call the client right away - even if you are unable to set the appointment within the next day or so, it's best to reach out to them right away. *The phone number has been validated prior to our allocation.*

What should you say when you call them?

Always make sure you speaking with the client named in the "spoke with box" below.

Hello, **John Doe**? My name is _____. I am an agent with Symmetry Financial Group and I am calling about your interest in **\$ 100,000** in Life Insurance coverage. You submitted a request for this information online on our website a day or two ago, do you remember? Great, I believe you also heard from **Susan Sebring-Mojica** to let you know an agent would be reaching out? Ok, let me just verify some of the information you provided so I can work up several options for you. I have your age as **66**? Etc...

Lead Information

Lead By: Susan Sebring-Mojica Lead Date & Time: Jan 14 2019 12:51PM

Client Information

Spoke with: John Doe Gender: Male

Protection for you or spouse?

Spouse Name:

Client Age: 66 Spouse age:

Tobacco use (client): No Tobacco use (spouse): No

Beneficiary info:

Street Address: 1234 w Happy St

City: Springville State: OH ZIP: 28806 County: Wake

Phone Number: 1-123-456-7890 Alternate Phone Number:

Email: example@sfglife.com

Best time to call: Password:

Additional Info:

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