



## B.E.S.T. SYSTEM – CALL IN SCRIPT

**BE BUSY.** Pick up the phone! This is a simple numbers game: the more dials you make, the more appointments you set and the more families you help. Most successful agents make 250 or more per week.

**ESTABLISH** the reason why you are calling.

"Hello, \_\_\_\_\_. My name is \_\_\_\_\_. I'm calling about your mortgage in the amount of \$\_\_\_\_\_ with \_\_\_\_\_ bank. I'm getting back to you about the postcard you received in the mail regarding your mortgage. You or your spouse called the number and followed the phone prompts to answer a few questions so that we could contact you back regarding your mortgage protection options. I was in the middle of getting your options worked up this (morning/afternoon/evening) and realized I needed about 10 seconds of questions to get this taken care of for you, so let me just verify some of the information you provided so I can finish working up several options for you. You indicated **when you called in that...**

(Start filling out client qualification form.)

**I DON'T REMEMBER DOING THAT:** It was either your or your spouse who received the postcard in the mail about your mortgage. You or your spouse called the number on it and answered the prompted questions to request some pricing options about protecting your home in case God forbid something happened to one of you. I was the case worker assigned to get this taken care of for you and I only have 10 seconds of questions... (Back to script – NO PAUSE)

**STILL DON'T REMEMBER:** Well, it was obviously it was your spouse that requested this, so if you could me a favor and let them know we're giving them a call back and just let them know we'll touch base with him later. I appreciate your time.

**CALL ME BACK:** I'm not really set up for callbacks... I just have about 10 seconds

1. ...Your date of birth is \_\_\_\_\_, your height is \_\_\_\_\_, and your weight is \_\_\_\_\_. (Spouse's) DOB is \_\_\_\_\_, height is \_\_\_\_\_, and weight is \_\_\_\_\_.
2. You indicated that neither of you use tobacco products in any form, is that correct? Do you plan on starting to use tobacco products?
3. 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?
4. Are you or (spouse) taking any medication for anything at this time? Have either of you been admitted to the hospital in the past 10 years?
5. What do you do for work? What about (spouse)? What is your typical work schedule?
6. On the letter, it says the amount of the mortgage to be covered is \$\_\_\_\_\_, is this correct? What is your monthly payment?
7. Most importantly, when you sent in the form, who were you looking to protect? Was it mostly for coverage on you, (spouse), or both?

## SET APPOINTMENT.

I am meeting with a handful of homeowners in your area tomorrow **so I wont have much time...maybe about 15 minutes** to show you what coverage you'll qualify for...but I am able to squeeze you in at \_\_\_\_\_ or \_\_\_\_\_. Which time is best for you **(and spouse, when you'll both be home together)?"**

**So I'm going to hold that spot for you (and spouse). Are you POSITIVE this will work for (THE 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 with you and you think will work with *(him/her)*. I'll hold the spot and then you can check with *(him/her)*. So, assuming this time works for your spouse, is \_\_\_\_\_ **definitely a good time for you?**

**YES:** I'll hold the spot, if you could give *(him/her)* a call real quick after we talk and if it ISNT good call if you could call me back by today at (one hour or give deadline). If I don't hear from you by then I'm assume were all set and I'll look forward to seeing you at the appointment time. Fair enough?

**NO:** (Go back to date and time progression)

**UNSURE STILL:** I'm meeting with 10-15 people that day, so if you aren't sure let's find another time that works (Back to date and time progression)

Can you grab something to write with?"

## TIE DOWN.

"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 whole 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. What time did I say again? Ok, if you could write down that time at the top of your paper as I will be there tomorrow night. 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.**