

# B.E.S.T. System Script

Including Telesales + Webinar Sales

## 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 350+ dials per week or they dial until they have 12-15 appointments.

## Establish the Reason You're Calling

You're calling because the client sent something to you asking for your help! Now it's your turn to help your client obtain the coverage they deserve.

"Hey, *(first name)*. Hey, this is *(your name)*. [Pause]

I'm calling about your mortgage in the amount of \$\_\_\_\_\_ over at *(address)*.

[Pause and wait for response.]

I was getting back to you about the *(request you made/letter you sent back)* for *(insert lead type/concept here)* that is designed to protect your family/pay your mortgage/etc. [No pause]

I just need to quickly verify some of the information you provided so we can get those options out to you. [No pause]

I have here your age/DOB as \_\_\_\_\_ and your spouse's age/DOB as \_\_\_\_\_.

[Start filling out a client qualification form.]

1. Have you guys used any nicotine or tobacco in the last 12 months? You don't plan on starting this weekend, do you? [Get a laugh and put them at ease.]
2. How's your health, any hospital stays, ambulance rides or major surgeries for you in the past 10 years or so? And how about *(spouse)*, anything for them? Is there any history of things like High Blood Pressure, Diabetes, Cancer or heart attack for either of you? What medications does the doctor have you on?
3. What do you do for work, anything dangerous, like a stunt man/rodeo clown? [Get a laugh] What does your work schedule look like? *(M-F 9-5?)* What about your spouse?
4. [Mortgage Protection] It says the amount of the mortgage to be covered is \$\_\_\_\_\_ is this correct? What is your monthly payment? Is that a 15-year or a 30-year?
5. Most importantly, when you sent in the form, what was your main concern? Was it mostly for coverage on you, *(spouse)*, or both?" [Repeat back what you hear.]

## Set Appointment

"Ok that makes a lot of sense. I'm going to do some homework for you and shop around with several of our top-rated carriers. Once I get the best options narrowed down, you, *(spouse name)* and I will sit down for about 20 minutes to review these programs. Your job will be to pick out a plan that fits your needs and budget. Sound good?"



## Power Phrases for the phone

- "That's exactly why I am calling."
- "Here's what we're going to do."
- "Let's do this!"
- "I can try to squeeze you in at *(time)*."
- "Grab a pen and let me know when you are ready." vs. "Can you grab a pen?"

## Tie Down

### In-Home

"I have a crazy schedule this week. I'm working with a handful of families in your area on *(date)* [book within 48 hours] and I have a *(time)* or *(time)* appointment available. [Give alternate choice-two options.]

Which of those times work best for you and *(spouse)*?"  
[Wait for response.]

"Do you see any reason why *(spouse)* will not be able to join us? Okay so you're positive that time works for you *(and spouse)*, together?"

"Okay grab a pen and paper and let me know when you're ready. I am going to give you my information and a few things to have ready for our appointment."



"Now, what time did we say again? Okay, write that down at the top please.

1. My name is *(your name)* and I drive a *(describe car)*.
2. I will need to verify the name(s) and dosage(s) of your medications - please have those out.
3. Please have your doctor's information written down for me.
4. I'll ask to see a photo ID. I'll have my ID as well to show you.

Ok that should be all I need. Will the GPS bring me right to your house? What landmarks should I look for?

Okay, because I'm working with so many families each day, please give me a 30-minute window on either side just in case I'm running behind. Does that work for you?

Be sure to remind *(spouse)* about our appointment. Don't forget about me okay? Have a good weekend!"

[This phrase leads the client to say 'Thank you.']

### Virtual

"I have a ton of families requesting this option this weekend but let's find a 15-20 minute window when you and *(spouse)* can be in front of a computer together in the next 24 hours. Is the *(morning/afternoon/evening)* better for you today? Okay I have a *(time)* or a *(time)*. Which of those times works better for you and *(spouse)*?"  
[Give alternate choice two options]

If they're unable to use video/they are tech challenged:  
"Not a problem at all, we'll just take care of you with a phone call then. Is this the best number to reach you or is there another number you would prefer? And is the *(morning/afternoon/evening)* better for you today?"

"Okay, perfect. I'll schedule you for \_\_\_\_\_. Do you see any reason why you and *(spouse)* would not be able to make our appointment at that time? Okay, grab a pen and paper and let me know when you are ready to write down a few things."



"Here are a few things that you'll need to have out during our *(call /webinar)*. This will help speed up the whole process.

1. I need your doctor's name/address/phone number for both you *(and spouse)*. *(Spouse)* will be there for the appointment, right?
2. I need to verify name and dosage of any medications that you are taking.
3. I'll need a photo ID for both of you. A driver's license is fine. I'll have my ID for you as well.

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.

[If webinar] Give yourself a few minutes beforehand to get your computer set up.

What is the best email address for me to send the video conference link? Okay give me one second, I am going to send that link now. [Confirm that client receives email with video link.]

Five minutes before our meeting time, you'll just click on the link and your computer will open our video conference platform. You should not have to download anything to your computer. It will automatically start.

As a reminder, I have a lot of homeowners to help this weekend and I want to make sure I get to everyone. Please give me a few minutes of wiggle room in case I am running behind. Sound good? Okay be sure to tell *(spouse)* that we'll be meeting each other on the screen in case they want to brush their hair first! [Laugh] See you later today on the computer."