

B.E.S.T. System Script

Including Telesales + Webinar Sales

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

"Hello, _____. My name is _____. I'm calling about your mortgage in the amount of \$_____ with _____ bank. I was just getting back to you about that letter you sent in regarding mortgage protection coverage, do you remember that? Ok, let me just verify some of the information you provided so we can work up several options for you." *(Start filling out client qualification form.)*

1. You put down that your DOB 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?



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Set Appointment

"Ok, it takes about 15 minutes to see what coverage you'll qualify for. I have a handful of homeowners to see in your area tomorrow and I have a _____ or _____ appointment available. What is the best time for you and *(spouse)*?"

"I'm going to put you down for _____. Can you grab something to write with?"

*[Doesn't want to meet in person? SEE BELOW *Please note: The best practice is to ALWAYS attempt an in-person meeting first before agreeing to a telesales/webinar meeting.]*

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. 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!

If Setting Telesales or Webinar Sales Appointment

(Best to Set Within 24 Hours for Max Retention)

"Typically, we prefer to come to your home and discuss your options in person but given the current environment we ARE allowed to take care of families by phone or virtual meeting instead. We will be able to see each other on the computer and I can share my screen with you to view your options and answer any questions."

"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?"

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."

Telesales/Webinar Tie Down

"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 # 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.

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! *[haha]* See you later today on the computer.

Client Qualification Information

General Information

Client

Name _____

Birthday _____ Age _____

Height _____ Weight _____

Smoker _____

Spouse/Other

Name _____

Birthday _____ Age _____

Height _____ Weight _____

Smoker _____

Medical Concerns

(High Blood Pressure, Heart Attack, Stroke, Cancer, Diabetes, High Cholesterol, DUI/Substance Abuse, Any Surgeries or Diseases, Accidents in the Past 10 Years)

Client

Spouse/Other

Medications

Client

Spouse/Other

Mortgage Information

Loan Amount _____

Lender _____

Mortgage Term _____

Monthly Payment _____

Miscellaneous

Client

Occupation _____

Schedule _____

Beneficiary Full Name & Relationship _____

Do you have children? Yes _____ No _____ If yes, their ages _____

Appointment Date & Time _____

Directions to Home _____

Spouse/Other

Occupation _____

Schedule _____