



Outbound Lead Script

This opening script is intended to be used on compliant leads that are being outbound dialed. **The point is to be slightly vague up-front to give you 10-20 seconds to engage and quickly verify one piece of identifying information.** It's imperative that you avoid any dead air in the first part of the call, so make sure you have all the information you need in front of you – no fumbling, mumbling, or grumbling!



[Prospect's First Name?] –

Hi [Prospect's First Name], my name is [Your Name] and I know you weren't expecting my call, but I am getting back in touch with you today about the information you requested on the state-regulated life plans. ***(If they are under 50, we like to use the phrase "life plans" and if they are over 50, we like to use the phrase "final expense and burial plans," – but either way we do NOT use the word insurance at this point in the call).***

I just need to confirm the date of birth you entered (XX/XX/XXXX) – is that correct? OK great, now a little bit about me – I am a national broker working with the top insurance companies right here in [their state], so that means I work for my clients, NOT for the insurance company. Because of that, I can provide you with the best possible options without any of the hassle, does that sounds good?

Now [Prospect's First Name] you entered that you live in [city and state, address if you have it], is all that information correct or do I need to update it in the system? OK great, now that we've got the hard part out of the way, tell me a little bit about why you requested this information?



At this point, it's showtime! I recommend moving right into any script you may like or our tele-sales outline. While you are transitioning, make sure to *slow down* and build rapport before getting back to the basics of your fact-finding. Remember – the quality of your questions will determine the quality of your results, and the more questions you ask, the more tailored a plan you can provide for your prospect!