

PHONE SCRIPT

Joe?

Hey Joe, this is Alex, local manager at the benefits office here in Mecklenburg County

We're getting back to you about the online request that you sent in a little while ago, for help with the state regulated life insurance programs.

Just wanted to make sure we were getting this out to you with all of the right info.

Now Joe, we have your birthday down as 1/1/1965, I'm assuming that's correct?

And we have the delivery address as 123 elm st, is that still the best address for you?

Ok, perfect!!

Like I said, my name is Alex, and I'm actually the local manager that's assigned to your request!

As I'm sure you remember, there's no bloodwork, no injections, and you don't have to pee in a cup. They just have me come out there to verify an actual ID, make sure you don't weigh 600 lbs, and are not strapped to a hospital bed!

Now Joe, are you working or retired?

Single or married?

Ok perfect, now Joe, they have me dispatched out in your area over the next couple of days, helping other families with a bunch of these requests. Now, we really don't have any openings in the afternoon, but I'll be able to squeeze you in, for about 15 mins at 4:30pm or 7pm, which one works better?

Ok perfect and is that a house or apartment? (is there a gate code needed?)

Ok great, now Joe do me a favor and grab a pen and paper. I want to give you some of my personal info, for your security.

So my name Alex, A-L-E-X. Your confirmation code is 15608713, that's also my state license number. This is for the State Regulated Life Insurance Programs. And I'll be out there, what was the time again? Yes 4:30pm, just give me a window between 4:30 – 5:30 because I'm seeing a lot of families tomorrow and might be running behind.

I'll have a blue shirt on, that way you know it's me and you can put the shotgun away. I look forward to meeting you and helping you.

OBJECTIONS

(Callbacks)

Ok, perfect! What time do you normally get home? *wait for answer* ok perfect, that should work out pretty well for us. I'm Tobe, the local underwriter that's assigned to get you the info that you requested. We don't have anything at "X" time, but I can squeeze you in between 3 & 4, is there any reason that time wouldn't work for you?

(I'm Not Interested)

No problem Joe, I completely understand!

Good thing I'm just the local underwriter, not the sales agent. So I'm not really interested either! They just shoot me over there to get you the information you requested, and verify that it's going into the right hands. That way we aren't liable if something were to happen to you. Whatever you choose to do with it, is between you and the insurance company. So Joe, like I said, they have me dispatched out there tomorrow. Are the mornings a good time to get you this information? Or are the evenings much better?

(I've Already Taken Care of It)

Perfect Joe, that's exactly why I'm calling! You should've received your policy packet in the mail, have you received that yet?

IF YES.....

Ok perfect, that's actually what i'm calling about. Once you get your life insurance packet, they have someone come out to review it with you, and make sure there's no errors, so that there are no issues when your family tries to file a claim! Once we check that off, you will be all set.

(BACK TO SCRIPT)

IF NO....

No worries! I should be able to pull it up on my end! That's actually why I'm calling! Once you get your life insurance packet, they have someone come out to review it with you, and make sure there's no errors, so that there are no issues when your family tries to file a claim! Once we check that off, you will be all set.

(WHY DO YOU NEED TO COME OVER)

Yes Joe, all of these programs are all non med, so you don't have to worry about doing any exams or bloodwork. Instead, they just send out a local underwriter, to make sure no one is trying to get insurance in your name, and verify medications. This only takes about 10-15 mins. What time works best for you? X or Y?