**(CRM LIFE) Hired Booking**  (talk monotone, 3x dial, 3 times a day)

Any Rebuttal **“Perfect, that is why I am calling”** back to script.

Hi \_\_\_\_ this is \_\_\_. Getting back to you on some information YOU requested online about the \_\_\_ State life insurance programs. These are the programs that would protect your family financially if you were to pass away. I have your Date of Birth listed here as \_\_\_. And address as \_\_\_\_ We got that right? Do we have that right?

Ok great. Now we can’t go over it right now, because we have other appointments scheduled today. Just so you know, there are several different plans & options, and you get to pick the plan that fits your budget.

Now my job today is to set an appointment with a medical field underwriter so they can go over your options with you. Did you want your family protected in case of death and yourself protected incase you become disabled and can’t work or get seriously ill?

**Ok, what time do you get home from work?**

Let me see what openings I have left... Because we are backed up with requests we are implementing call windows, that way we can get to everyone requesting help. You will need to be home during the call window. **I have hour long call windows that start at \_\_\_, or \_\_\_ available. What time works better for you?**

You are required to be home. Not at work or driving. Will you be able to answer a phone between that call window of \_\_&\_\_ from home? Yes or No?

***IF ONE NAME***  I see one name here on the requests. Who would your life insurance go to if you were to die tomorrow? Who relies on you financially?What is their name **\_\_\_?** Does \_\_\_\_\_ live at the house? ***IF LIVES IN HOUSE:*** *Ok,\_\_\_ is* required to be there. Can \_\_\_\_ make that call window as well between \_\_& \_\_\_. **Yes or No?** If \_\_\_\_ isn’t there, they can’t do the appointment. Can you tell \_\_\_ about the appointment when we are done here? Ok. Thanks. ***IF DOESN’T LIVE IN HOUSE:*** Ok I will jot one down for the appointment.

***IF TWO NAMES:*** *Ok I see \_\_\_ on the request here. \_\_\_ is* required to be there. Can \_\_\_\_ make that appointment. **Yes or No?** If \_\_\_\_ isn’t there they can’t do the appointment. Can you tell \_\_\_ about the appointment when we are done here? Ok. Thanks.

**Ok I need you to grab a pen for the confirmation code..** Let me know when you're ready.

7W52, Day, Date, Medical Field Underwriter Name Ryan Reynolds, License #16493723

***\*\*\*Expect to receive a call from the field underwriter between the window of \_\_\_ & \_\_\_.***

**Can you read that back** to me to make sure we have it all correct.

1. And will you 100% be able to make the appointment? Yes or No?
2. **Can you add a reminder on the fridge, calendar or phone? Yes or No?**
3. **I’ll text you Ryan’s credentials** after this call so you can look him up and verify him.

We are looking forward to working with yo**u & helping your family on DAY *\*\*\*Expect to receive a call AT HOME between the window of \_\_\_ & \_\_\_.*** (**\*\*TEXT ID & License & Link**)