

B.E.S.T. SYSTEM

Phone Script

BE BUSY. Pick up the phone, this is a simple numbers game; the more dials you make, the more appointments you set – the more families you help. As long as you do the numbers, you cannot lose. Most successful agents make 250+ dials per week (depending on the type of leads worked).

ESTABLISH the reason you are calling is because they sent something to you!

“Hello John? My name is _____, I’m calling about your mortgage in the amount of \$125,000... and the reason I’m calling John was because you sent in that letter requesting mortgage protection? Do you remember that???” Please do not move to the next step without this established! (Helpful Hint: Slow down! Don’t speed read through this step. You are not a telemarketer!)

SET APPOINTMENT only after they agree that they remember sending the notice in. You say,

“Okay, I’m the case worker that’s in charge of your area. They have given me a handful of homeowners to see over the next few days. Now what’s the main reason that you and Mary requested coverage?” Allow for response. **“Is it in case something happens to you?”** Allow for response. **“Your wife?”** Allow for response. **“When You say something, what exactly do you mean?”** Allow for Response. **“What time do you generally get home from work?”** Allow for response. **“So you both are home by 6:45?, I have something at 6.45.”** You are assuming tomorrow. This step may seem bold and assumptive but that’s the name of the game. You are in control. It’s your schedule. The only option you give the homeowner is the time frame; you call the rest of the shots! To reduce the number of no-shows that you get, always add: **“Now you guys are pretty good about keeping appointments, right? The reason why I’m saying this is that my schedule stays extremely busy and when someone doesn’t keep their appointment, it severely limits the number of families that I’m able to help.”**

TIE DOWN. Tired of wasting time on appointments that thought you were just coming to talk?

“When you are ready, I need you to write down a few things to have out when I get there, and this will just speed up the whole process.

1st I need your Doctor’s name/address/phone # for both you and Mary. And Mary will be there right?

2nd I need any medications you guys are taking out on the table, if you could. By the way are you guys on any meds at all? What kind/what for?

3rd I will need a picture ID for both of you, a drivers license is fine.”

Now they know you are coming to do business. Imagine the confidence you will have walking into the house when the homeowner had done everything you asked them to do. **“That should be all I need, and what time did I say again John?”** People remember what they say better than what they hear, getting John to repeat WILL help with no shows. **“Okay if you could write that down at the top of your paper as I will be there tomorrow night. And give me 20 or 30 minutes either side of that time as I will be with other homeowners in your area. See you tomorrow!”**