

Sample Life Lead Plus Script from HBW Leads

INTRODUCTION

Hello [first name], this is [telemarketer name] calling from [agent company] on a recorded line, how are you today? As a leading provider of life and financial protection, we're helping neighbors in your area ensure that they and their loved ones are protected.

QUALIFYING QUESTIONS

1. Do you currently have Life Insurance? Y/N -
 - a. IF YES: do you have work insurance, independent insurance, or both? (drop down of Through Work, Independently, or Both)
 - b. IF Independently: Who is the policy with? (drop down of different carriers)
 - c. None
2. Are you happy with the amount you are saving for retirement? Y/N
3. Do you have any retirement accounts like an IRA or 401k? (drop down of IRA, 401K, Trust Fund, and Annuities)
4. Do you own or rent? (If yes, it qualifies)
5. Are you married?
6. How many qualified dependents do you have?
7. First and Last Name
8. Address
9. Are you between the Ages of 18-60 Y/N- Try then to get DOB. (If yes, it qualifies)
10. Date of Birth
11. Email
12. What's the best time to call you at? Morning, afternoon, or evening?

WRAP UP

"That's all we need right now, [first name]. [agent company] will be giving you a call back within 2 to 3 business days to go over the life insurance and financial review they have prepared and may possibly need to ask you a couple more questions about the information you've given me. Does that sound okay?"

Must say "YES" to be counted as a lead.

"Thank you very much for your time and have a great day."