



Personal Contact or Existing Customer

Phone Script

“Hey_____ . How is it going? Do you have a couple minutes to talk?”

The reason for my call is I have started a new career as an insurance professional. I don't want you to buy anything (so calm down lol), but I do have an ask for you. Would you let me come by or set up a virtual meeting so that I can do my presentation on you for practice? I mean if anything I offer you want, I will gladly sell it to you, but it is not expected.

What time works best for you? Morning or afternoon? 2 pm or 6 pm?”

Things to do after you set appointment:

1. Confirm physical or virtual address to meet
2. Ask them to set a reminder in calendar or a note somewhere so they don't forget
3. Take notes on the conversation so you go in prepared and so you remember them.

Keys to appointment setting:

1. Be enthusiastic!
2. Follow the script but don't be a robot. Have a conversation with the prospect.
3. Call at all different times of the day/evening.
4. Don't leave voicemails. Stop by if you can't get a hold of them over the phone. You may have to stop multiple times so be persistent.
5. Never set exact appointment times. Always give yourself a window of at least an hour (10-11 am, 3-6pm).