

## Script and Hints for Appointment Setting

Once the prospective client answers the phone-

“Hi, Client’s name uhh\*\* this is, this is your name

*\*\*use this natural fumble to sound like a real person and not a telemarketer!*

“I’m calling because I just received the card that you filled out and sent back to me saying that you are interested in some free information regarding covering your final expenses. I’m going to be in your area tomorrow and I really want to go ahead and get this information to you as soon as possible. Will about time be okay for you?”

“It will only take me a few minutes once I’m there, the address that I have here is \_\_\_\_\_, is that right?”

“Excellent, do you have a pen and paper nearby? I just want you to jot down my first name. It’s \_\_\_\_\_. Last name \_\_\_\_\_ (spell it out)....Now put down time on day...that’s tomorrow.”

“Well thank you for your time, it will be really great meeting you at time tomorrow.”

“Have a great day ☺ “

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### \*Extra Hints\*

- Call around 6 or 7 when people are getting off work and/or when older adults are settling in for the night
  - Weekends are good times to call as well
- **Don’t leave voicemails, you won’t get a call back!**
- A combination of appointment setting and door knocking is the technique used by our top producers
- Even if the prospective client says “no” still knock on their door, you can still make a sale!
- Buy a tape recorder and/or practice with family to ensure your voice sounds natural and not phony
- Instead of having the attitude that you have deal *for* your client, have an attitude that conveys that you want to make a deal *with* your client
- If you still aren’t good at appointment setting, even with *lots and lots* of practice hire an appointment setter to do it for you
  - Craigslist is a good source for these
- Insurance Magazines often contain many more suggestions about appointment setting, many of these magazines are free and contain advice from very reliable sources