

Final Expense Script

Hi. This is With Senior Benefits. How are you?

I'm calling to let you know of a new LOW COST Life insurance plan that has just been approved in your state<<STATE ON DIALER>>. So our agent will contact you back to give you more information about it.

Would you like to learn more about this new Low Cost "LIFE insurance plan"?

If YES Continue

(If Not interested /YES Insurance One Rebuttal allowed)

1. What is the best contact time? (Mornings, Evenings or Afternoons)
2. If you choose to take coverage, who would the benefit go to? Your spouse, son or daughter?
3. Would you prefer to receive information on 5, 10, or 20,000 in coverage?
4. Your best callback number is:
5. Your age is:
6. Do you have an active savings/checking account to pay for the policy?
7. Do you use any Tobacco products like cigarettes, cigars or chewing tobacco?
8. Do you have an Email address? If yes, note down the email address.

Alright our local agent will call you back in next couple of days to discuss your final expense plan
Please remember to talk to our local agent <<AGENT NAME>> within the next few days about this Final
Expense Insurance plan.

Have a wonderful day.

QUESTIONS/REBUTTALS

WHERE LOCATED? (CX ASK WHERE THE AGENT IS LOCATED/YOU)

We're located in Florida, however we have 3000 insurance agents across the country that helps individuals like yourself find an option for low cost Life Insurance

NOT INTERESTED REBUTTAL (CX SAYS NOT INTERESTED/CAN'T DO IT RIGHT NOW)

Ok but before you go these new affordable plans has just been approved in your state and almost everyone qualifies.
Our agent (agent name) can give you a contact back and give you more information would that be ok?

NOT RIGHT NOW REBUTTAL (CX SAYS THEY CAN'T TALK RIGHT NOW/DO IT RIGHT NOW)

oh no, this is not for right now the agent will contact you back within the next few days to review your options with you would that be ok?

ALREADY HAVE INSURANCE OPT. 1 (CX SAYS THEY HAVE INSURANCE)

Great Its good you're thinking ahead but the cost of funeral has increased over the years. Would you like to learn more about possibly adding some coverage if it was affordable. Our agent (agent name) can give you a contact back with more information would that be ok?

ALREADY HAVE INSURANCE OPT. 2 (Cx Says they have Insurance)

Well, it's good to be ahead however all of our clients feel that every dollar is important these days. We would like show you some comparable plan that could save money and assure you that you are getting the best value for your dollar.

HOW DID YOU GET MY # (CX ASK HOW YOU GOT THEIR # INFO)

We usually get your information from online requests or senior databases

MAIL? (CX ASK TO MAIL THEM SOMETHING)

Unfortunately, I won't be able to do that but when the agent contact you back they will provide you with all the information you need.

WHERE CALLING FROM? (Cx Ask where YOU ARE CALLING FROM)

Senior Benefits, we're a division of US life

WHAT IS FINAL EXPENSE INS. (EXPLAIN THE INSURANCE IN MORE DETAIL)

Final expense is a life insurance policy that covers burial expense and any other debts or obligations you may have.

HOW MUCH WILL IT COST? (Cx asks about cost.)

The policies are inexpensive and have only small monthly premiums. We'd love to set up a time for a specialist to contact you back with the specifics.

NO INCOME/NO MONEY (Cx says they can't afford etc..)

I understand, that is the GREAT thing about this plan for many people it may cost less than \$1 per day, do you think with your current budget you could afford that.

HEALTH PROBLEM (CX SAYS THEY HAVE HEALTH PROBLEMS OR THEY CAN'T GET INSURANCE)

I'm sorry about that But that is ok, this new plan is approved to cover everyone regardless of Health conditions

OFFSCRIPT (FOR QUESTIONS YOU CAN'T ANSWER)

my only job is to schedule a contact back with one of our specialist so they'll be the better person to answer any questions you have

Final Expense Qualified Lead Criteria

- In order for a lead to be qualified the customer must be between the age of 50-80
- Customer FULL NAME is required.
- The customer must understand the purpose of the call.
- Must have a clear understanding that a licensed insurance will be calling them back to discuss final expense insurance.
- The script needs to be followed very closely. Getting far away from the script will cause the lead to be disqualified.
- All Leads must be submitted on the web form in order to be verified by QA Department