



## FE VIRTUAL APPOINTMENT SETTING LEAD SCRIPT

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Hey **(prospect name)** \_\_\_\_\_

It's **(name)** \_\_\_\_\_, I'm getting back to you about your recent request about the State Regulated Final Expense plans for \_\_\_\_\_ **(state)**

We are processing your request and I just need to confirm a couple of things on here so that I can get this information out to you.

I have you listed as:

**Name** \_\_\_\_\_

**Address** \_\_\_\_\_

Now were you looking for information just for you or someone else as well?

Ok great,

Go ahead and can grab a pen and paper and we can go ahead and knock this out.

**(If they aren't able to at the moment)**

No worries, I just need to set up a time to make sure that you have the information that you requested. I have some time available \_\_\_\_\_ **(day of the week)**  
Are you usually home in the mornings, afternoons, or evenings?

Give 2 options for times?

Set the appointment- Have them write down your name/phone number

Bookend your day



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**Response:** I already have insurance I don't need it

Perfect, most of the people I talk to do have some coverage, but these plans work a little differently. I'm guessing that you were just trying to figure out how these plans work. My job is to get you the info and see if you even qualify. Now are you usually home in the mornings, afternoon or evenings?

**Response:** I'm not interested anymore

Oh I understand, we hear that from time to time. The only reason I am reaching out to you is that we received this request in the mail. Now, I'm not sure what changed but I am guessing that when you sent this in you were thinking about someone that you care about and just wanted to know what this was and how it works. My job is to get you the information. What you do with it is up to, but at the very least you will have it. Now are you usually home in the mornings, afternoon or evenings?

**Response:** somebody already helped us with that

Ok great, I hear that from time to time but if you are in our system that means that you someone didn't finish their job. These plans are updated from time to time and we are supposed to make sure that you have the most updated information so that you know what discounts are available to you. My job is to get you the information. What you do with it is up to, but at the very least you will have it. Now are you usually home in the mornings, afternoon or evenings?

My name is \_\_\_\_\_ and I have our time set for **(time)** \_\_\_\_\_ on **(day)** \_\_\_\_\_. If I get caught in another appointment that lasts longer than I expect then I will call or text and let you know if I am running late.

I look forward to speaking to you on \_\_\_\_\_.