**Final Expense Script**

(Clients Name) \_\_\_\_\_,

Hey (Clients name) \_\_\_\_\_This is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I'm your case manager here at the (name of the county) Senior Benefits Center. I'm getting back to you about that postcard you sent into us requesting information on a program that would help take care of your final expenses. I’ve got to verify a few things: ASK ABOUT THE LEAD – Age, Address, spouse

Great well it sounds like I have the right person and I just need to make sure I'm getting this to you and not your neighbor. I just wasn’t sure, is the morning or afternoon better for you tomorrow? (OR are you retired or do you still work? OR do you get up early or do you like to sleep in?)Good deal, is there any reason you won’t be home tomorrow at about \_\_\_\_\_\_\_\_\_?

Sounds good, can you go ahead and grab a pen for me and let me know when you’re ready? if you could write my name down, and…..shoot! what time did we say again? Gotcha, write that down so you don’t forget about me (This makes them hear it, say it, AND write it)

You're still at \_\_\_\_\_\_\_\_\_\_\_ (first part of address) Right?

Ok, is your house pretty easy to find with a GPS?

I’ll be driving a \_\_\_\_\_\_\_\_, so when you see me pull up just don’t let the dogs out on me. Bye.

**Mortgage Script**

(Clients Name) \_\_\_\_\_,

Hey (Clients name) \_\_\_\_\_This \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I'm you’re case manager over here at the (name of the county) Mortgage Protection Center. I'm getting back to you about that postcard you sent into us requesting information on a program that would help pay off your mortgage. It’s my job to verify a few things: ASK ABOUT THE LEAD – Age, Address, spouse, mortgage amount, etc

Great well it sounds like I have the right person and I just need to make sure I'm getting this to you and not your neighbor. I just wasn’t sure, do you normally work on \_\_\_\_\_\_\_days? Good deal, what works better \_\_\_\_ or \_\_\_\_\_?

Sounds good, can you go ahead and grab a pen for me and let me know when you’re ready? if you could write my name down, and…..shoot! what time did we say again? Gotcha, write that down so you don’t forget about me (This makes them hear it, say it, AND write it)

You're still at \_\_\_\_\_\_\_\_\_\_\_ (first part of address) Right?

Ok, is your house pretty easy to find with a GPS?

I’ll be driving a \_\_\_\_\_\_\_\_, so when you see me pull up just don’t let the dogs out on me. Bye

**3 Keys to making appts**

1. **Name**
   1. Say it like a statement not a question
      1. This prevents the client from going on defense and immediately recognizing that they don’t know you
   2. Say it frequently! It’s their favorite word
2. **Tone and pace**
   1. Low and slow like good BBQ
   2. You want to sound extremely calm almost like a minimum wage government employee
3. **Questions**
   1. NEVER stop talking without asking a question

**Common Objections**

Always end talking on a question – This is how you control the conversation

When handling objections the goal is to agree, divert, redirect to get back to the script using a transition statement

The important part is getting back to the script

These are a few of the lines you could use in these situations

* **We don’t remember** –
  + This is \_\_\_\_\_\_\_\_\_\_\_\_\_ right? Over on \_\_\_\_\_\_\_\_\_\_(address)? . (wait for response) You put down ( verify information)
* **Busy, or work real late-**
  + No worries, so do I; What time do you typically get your day started/wrap up your day?
* **Already took care of** that
  + That’s actually the purpose for my call, we have updated rates that I need to get out to you, what time works better for you to get the new information, morning or afternoon?
  + That makes my job much easier, I’ve just got to get this out to you so we close your file and take you off our list…
* **Do you have to come to the house** 
  + Yes, I have to verify that you’re the upright living breathing person that mailed this in, and not your neighbor