

## **Daniel Kirby's Text Appt Booking Guide**

### **(IM) Initial Text Script (MTG);**

Hey (Name), this is Ryan Reynolds. I'm the field underwriter assigned to get you this information regarding the mortgage protection plan and its benefits. We are doing everything virtually now so it only takes about 15 minutes to go over. What time are you available for me to give you a call today or tomorrow?

### **(IF) Initial Text Script (FEX):**

Hey (Name), this is (your name). I'm the field underwriter assigned to get you this information regarding the final expense plans and its benefits. We are doing everything virtually now so it only takes about 15 minutes to go over. What time are you available for me to give you a call today or tomorrow?

### **(II) Initial Text Script (Internet):**

Hey (Name), this is Ryan Reynolds. I'm the field underwriter assigned to get you this information Regarding the new (state) non-medical life insurance plans and its benefits We are doing everything virtually now so it only takes about 15 minutes to go over. What time are you available for me to give you a call today or tomorrow?  
(if they reply with "today" or "tomorrow")

(Time) Perfect, I have a 10:15AM, 2:15PM, and 4:45PM available. Which time works best for me to give you a call?

### **(\*Then once time is chosen)**

(GT) Great, I will give you a call at (TIME) tomorrow. Talk to you then and have a great rest of your day.

### **(If they reply with a specific day and time that is already booked.)**

(AI) I actually have a call setup with another family at that time. Would either \_\_\_\_ or \_\_\_\_ work with you?

### **(\*The once a time is chosen)**

(GT) Great, I will give you a call at tomorrow. Talk to you then and have a great rest of your day.

## **Common objections:**

### **(NL) "I am no longer interested or "No thank you"**

Ok. I know this was originally important to you like it is for every family that sends back this request. Are you no longer interested because you couldn't find something that fits in

your budget or that you don't think you will qualify for it?

**(TC) \*I already got this taken care of**

Great! Glad to hear you already got coverage in place. Would it make sense to you if I was able to find something for you that either had better benefits or more coverage for the same cost, or the same amount of coverage for a much cheaper cost?

**(CD) "I can't do today or tomorrow"**

No problem, I have some availability on (another day and times) which one works best with you?

**(AM) \*I already met with an agent and we decided not to get the covered.** This is probably why your file came across my desk. I know this was originally important to you like it is for every family that sends back this request. I understand Are you no longer interested because you couldn't find something that fits in your budget or that you don't think you will qualify for it?

**(PR) (price is the reason)**

Ok perfect, my job is to find something that protects your family while making sure to keep it in your budget. This should only take about 15 minutes to go over. For tomorrow, do you prefer (3 time slots).

**(HR) (health is the reason)**

I can definitely see your concern. However, since I work directly with the department, I am able to look through the different carriers and find one that will approve you. Would you prefer me to give you a call later today or sometime Tomorrow?

**(Q) "I just want the quotes/price"**

Perfect. That's exactly what I'll be able to help you out with. Part of my job is to find out what it is you qualify for in order to determine the best possible option for you and your family and to make sure we are not looking at something we can't even get. Would you prefer for me to call you today or tomorrow?

**Follow up text for people who have not replied to initial text:**

(Next Day, then next day, then next day)

**(2nd) 2nd Text.** Good Afternoon! I have some availability later this evening as well as tomorrow. Is there a good time that works for me to give you a call to go through the information with you?

**(3rd) 3rd Text.** Good afternoon. This is the last time that these plans will be offered with no physical exam required. Starting in the next few months, they will be requiring a full blood panel

and drug test. I have some availability this evening as well as tomorrow. Let me know what a good time to call is so I can go through the information with you.

**(4th) 4th Text.** Hey (Name). This is Ryan again. I noticed you have not responded back to any of our previous messages. If you would like to schedule a time to get the information please respond back with "YES" if you would like to not be texted going forward please respond with "STOP"

**If NO shows, Text This:**

Good afternoon! Just tried giving you a couple calls for our 2:00pm phone call today. If now is still a good time shoot me a call back. If there's a better time for you later today or tomorrow just text me and let me know. Talk soon!