

SCRIPT

Hello, _____ (call by first name)? (Pause)

_____ (first name), this is _____ (your name) and I received a card that you filled out and mailed back to us looking for final expense information. Do you remember filling that out and sending it in?

GREAT! I did receive it here in the office and I am going to be out in your area tomorrow (today) and I NEED to set up a time to get together with you/you both, (use plural if info for two people is filled out) and show you how these programs work. So which works better for you/you both (plural again if appropriate) morning or afternoon?

Afternoon? Great! I have an opening at (pick two times such as 1:15 or 2:15.) Which time works better for you/you both?

O.K. 2:15 tomorrow will be fine I am marking it down in the book for tomorrow at 2:15 and I NEED you to mark it down somewhere for tomorrow at 2:15 also. OK. I will see you tomorrow... and you still live at (state the address, "123 Main St.??") O.K. great see you guys tomorrow at 2:15ish bye, bye. **HANG UP!! YOU DID IT!!**