Final Expense

LEADS

Final Expense Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] with [Company Name]. How are you today?

[Pause for response.]

I'm calling because you recently expressed interest in Final Expense Insurance—a life insurance plan designed to cover funeral expenses. We have a low-cost plan recently approved in your state. I'd love to provide more details and help you find the best coverage option.

Before we proceed, I'd like to ask you a few quick questions to ensure we're offering the best plan for you.

Information Gathering (For All Scenarios)

1. **Full Name:**
   - Could you please confirm your full name?
2. **Date of Birth:**
   - May I ask your date of birth to ensure you qualify for the plan?
3. **Address:**
   - Can I please confirm your address to ensure we have the correct location for this plan?
4. **Beneficiary:**
   - Who would be the beneficiary of this policy (spouse, child, etc.)?
5. **Coverage Amount:**
   - What coverage amount are you interested in? ($5,000, $10,000, $20,000)
6. **Smoker or Non-Smoker:**
   - Are you currently a smoker or a non-smoker?
7. **Active Checking or Savings Account**:
   - Do you have an active checking or savings account where payments can be made from?

1.Callback Lead Handling:

Step 1: Confirm Interest:

- Are you still interested in learning more about this Final Expense Insurance plan?

Step 2: Schedule a Callback:

- When would be the best time for our agent to call you back to review your options? We can schedule it for:

- **Morning**
- **Afternoon**
- **Evening**

Step 3: Verify Details:

- I just want to confirm the details so we can schedule your callback:

- **Full Name:**
- **Date of Birth:**
- **Address:**
- **Beneficiary:**
- **Coverage Plan:**
- **Smoker/Non-Smoker Status:**
- **Checking/Savings Account:**

1. Step 4: Close the Conversation:

Great! You'll receive a call from our agent [Agent Name] on [Scheduled Time]. Please expect the call, and thank you for your time!

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2. In-Person Appointment Handling:

Step 1: Build Interest for In-Person:

- If you prefer, we can set up an in-person meeting with one of our agents to go over the plan in detail and help you select the best option. Does that sound good?

Step 2: Schedule the Appointment:

- What day and time would work best for an in-person appointment?
- **Option 1:** [Date/Time]
- **Option 2:** [Date/Time]

Step 3: Verify Details:

- Let's go over your information to ensure everything is set for the meeting:
- **Full Name:**
- **Date of Birth:**
- **Address:**
- **Beneficiary:**
- **Coverage Plan:**
- **Smoker/Non-Smoker Status:**
- **Checking/Savings Account:**

Step 4: Confirm Appointment:

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. They'll provide all the details you need to make the right choice.

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3. Live Transfer Handling:

Step 1: Live Transfer Introduction:

- I can transfer you to a specialist right now who can walk you through the final expense plan in more detail. Do you have a few minutes to speak with them?

Step 2: Verify Details:

- Before I transfer you, let's quickly confirm your information:
- **Full Name:**
- **Date of Birth:**
- **Address:**
- **Beneficiary:**

- **Coverage Plan:**
- **Smoker/Non-Smoker Status:**
- **Checking/Savings Account:**

Step 3: Initiate the Transfer:

- Perfect! I'll transfer you now to [Agent Name], who will guide you through the process and answer any questions you may have.

Step 4: Close the Transfer:

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested:**

  "I understand. However, this plan has helped many people like yourself secure affordable coverage. Would it be okay if our agent calls you back to provide more information?"

- **Already Have Insurance:**

  "That's great! Many of our clients already had coverage, but found this plan offers better value. Would you be interested in exploring your options?"

- **Can't Afford Right Now:**

  "I understand, and that's what makes this plan great—it starts at just $1 a day. Could we set up a quick callback to go over the details?"

- **How Did You Get My Information?:**

  "We usually receive information through online requests or from senior databases."

Final Confirmation (For All Scenarios)

Before ending the conversation, always confirm the following details:

- **Full Name**
- **Date of Birth**
- **Address**

- **Beneficiary**
- **Coverage Plan**
- **Smoker/Non-Smoker Status**
- **Active Checking or Savings Account**
- **Next Steps (Callback, In-Person Appointment, or Live Transfer)**

Closing Statement:

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best final expense plan to protect your family. If you have any questions, feel free to reach out to us at [Phone Number]. Have a great day!

CALLSHANDY
LET ME HANDLE