

# B.E.S.T. System Script

## THE B.E.S.T. for EVERY lead type

The B.E.S.T. Script is your multi-tool for every lead type. Only slight adjustments need to be made to effectively adapt this script to any lead.

"Hey, *(First name)* [Wait for response] Hey, this is *(your name)* I'm calling about your request for *(lead type)* coverage that is designed to...

## Be Busy

Pick up the phone! This is a simple numbers game. The more dials you make, the more appointments you set and the more families you help. Most successful agents make 350+ dials per week or they dial until they have 12-15 appointments to submit \$5,000 + APV weekly

## Establish the Reason You're Calling

You're calling because the client sent something to you asking for your help! Now it's your turn to help your client obtain the coverage they deserve.

"Hey, *(First name)* (Wait for response) Hey, this is *(your name)* I'm calling about your mortgage in the amount of \$ \_\_\_\_\_ over at *(address)*.

### [Pause and wait for response.]

I was getting back to you about the request for *(insert lead type/concept here)* coverage that is designed to protect your family/pay your mortgage/etc. I just need to quickly verify some of the information you provided so we can get those options out to you. I have here your age/DOB as \_\_ is that correct? **[Start filling out a client qualification form.]** And your spouse's age/DOB as \_\_.

1. Have you used any nicotine or tobacco in the last 12 months? You don't plan on starting this weekend, do you? **[Get a laugh and put them at ease.]**
2. How's your health, are you in pretty good health? What medications does your doctor have you on? How about hospital stays, ambulance rides or major surgeries for you in the past 10 years or so? And how about *(spouse)*, anything for them? Is there any history of things like High Blood Pressure, Diabetes, Cancer or heart attack for either of you? What's your height and weight?
3. What do you do for work, anything dangerous, like a stunt man/rodeo clown? **[Get a laugh]** What does your work schedule look like? *(M-F 9-5?)* What about your spouse?
4. **[Mortgage Protection]** It says the amount of the mortgage to be covered is \$ \_\_\_\_\_ is this correct? What is your monthly payment? Is that a 15-year a 30-year?
5. Most importantly, when you sent in the form, what was your main concern? Was it mostly for coverage on you, *(spouse)*, or both?" **[Repeat back what you hear.]**



## Power Phrases for the phone

- "That's exactly why I am calling."
- "Here's what we're going to do."
- "Let's do this!"
- "I can try to squeeze you in at *(time)*."
- "Grab a pen and let me know when you are ready." vs. "Can you grab a pen?"
- Can you just email/call me back later?

*"That's a great idea! I'll be super brief. Let me verify your information quickly, then I will get your options out to you."*

**[TIP: We NEVER email options. The goal of the initial call is to book an appointment, then share their options during the live appointment]**

## Set Appointment

"Ok that makes a lot of sense. I'm going to do some homework for you and shop around with several of our top-rated carriers. Once I get the best options narrowed down, you, (*spouse name*) and I will connect for a few minutes to review these options. Your job will be to pick out a plan that fits your needs and budget.

## Tie Down

**Phone** "I have a crazy schedule this week, I'm working with a handful of families in your area on (*day*) [book within 48 hours] and I have a (*time*) or (*time*) appointment available. [Give alternate choice-two options]

"Which of those times work best for you and (*spouse*)?" [Wait for response.]

"Okay so you're positive that time works for you (*and spouse*), together?"

"Okay grab a pen and paper and let me know when you're ready. I am going to give you my information and a few things to have ready for our appointment."

- My name is \_\_\_\_\_ and what time did we say again? Okay \_\_\_\_\_perfect.
- Identification
- Dr's info
- Medications

"Okay I have us for (*Day*) at (*Time*)? Sometimes the families that I am working with need a little extra time with me. Give me a 15-30 minute window and I will make sure I give you the time you need as well. If I am running more than 30 minutes behind, I will give you a call.

Have a great rest of your day and I will look forward to seeing you on \_\_\_\_\_ at \_\_\_\_\_.