IN-HOME APPOINTMENT BOOKING SCRIPT

1. “Hi [Client’s Name]? Hi [Client’s Name] this is [Your Name] and I was just getting back with you real quick about the form that was filled out for the final expense plans, and I see that you put your date of birth as [DOB], is that correct? Ok and was this filled out for yourself or for a loved one?”

2. Ok got it. So [Applicant’s Name], I’m going to have you off the phone here in a second, I just need to verify some of the small details you gave us real quick.

3. It looks like you put your address down as [Address], is that correct?

Ok perfect, and are you currently working, retired or unemployed?
(If they say Retired, say “Ok, being retired, do you currently receive a pension, social security or disability benefits?”)

Ok, and last question…were you looking to leave extra money behind for the family to cover bills, leave an inheritance, or were you just mainly wanting to cover those funeral expenses?”

4. Ok perfect, so [Applicant’s Name], I’m the field agent assigned to your request, and they have me dispatched in the area tomorrow. What’s the best time to get this information out to you, morning, afternoon, or evening?

Ok, I can possibly squeeze you in at [Time] or [Time], which time works best for you?

5. Ok perfect, now is this a house or an apartment? Any gates with gate codes or dogs I’ll have to jump over?
6. Ok perfect. So, I have you down for tomorrow at [Time]. Just please allow me a 30minute gap because some families have more questions than others during the appointment, is that ok?

Now [Applicant’s Name], I help a lot of families throughout the day, so is there any reason that you won’t be there tomorrow? Any appointments you might have forgotten about?

7. Ok perfect. So I’ll see you tomorrow at [Time of App], You have a good rest of your day [Applicant’s Name]…be safe ok? God bless. Bye