New Agent's Top 25 Script

"Hi [Contact's Name], Hi this is [Your Name]." **[Follow up with small talk: How have you been?]**

"I was calling because I just started as an independent insurance broker and I'm currently in training to become certified and it includes ten field trainings. My goal is to get my 10 training appointments done in the next week and I was hoping you (and your spouse, partner, etc.) would be able to help me out by being one of my training appointments?"

[Wait for their answer. They'll say Yes or Sure]

Ok great, thanks! We do our field trainings on [Next Day] and [Next Field Day], what's better for you? Ok, and what time will be best? Perfect, I have you scheduled in for [Day and time of Appointment]. Is there any reason you might not be there? Any appointments or errands you may have forgotten about? Ok perfect, thank you [Contact's Name], I appreciate your help. Have a great rest of your day, talk to you soon. Bye"

Addressing Concerns

"What is the field training about?"

"I'll just be stopping by with my trainer for about 30 minutes to show you how we help families. It's not for you to buy anything, it's just to get my training out of the way and if you feel it's something that might be helpful to people you know, maybe in the future you can just send me some referrals if anything. What's better for you tomorrow or [Day after]?"

"I don't want to buy anything."

"No worries. It's not for you to buy anything, it's just to get my training out of the way and if you feel it's something that might be helpful to people you know, maybe in the future you can just send me some referrals if anything. What's better for you tomorrow or [Day after]?"

Always give two choices, direct them to a date and time. "What's better for you, Wednesday or Thursday, weekday or weekend?"

Manager's Top 25 Script

"Hi [Contact's Name]? Hi [Contact's Name] this is [Your Name] and I'm calling on behalf of [Agent's Name], he/she said that you're his/her [Relation], is that right? Ok, perfect. So I was calling because he/she just started as a broker here with us and he's/she's currently in our training program. The training program includes ten field trainings, and my goal is to help her get 10 training appointments done in the next week. So I was just hoping you would be open to being one of her training appointments and helping her out with that?"

[Wait for their answer. They'll say Yes or Sure]

Ok perfect, thanks! We do our field trainings on [Next Day] or [Day after] What's better for you? Ok and what time will be best? Perfect, I have you scheduled in for [Day and time of Appointment]. Is there any reason you might not be there? Any appointments or commitments you may have forgotten about? Ok, perfect, thank you [Contact's Name], I appreciate your help. Have a great rest of your day. Bye"

Addressing Concerns

"What is the field training about?"

"We'll just be stopping by for about 30 minutes to show you how we help families. It's not for you to buy anything, it's just to get his/her training out of the way and if you feel it's something that might be helpful to people you know, maybe in the future you can just send him/her some referrals if anything. What's better for you tomorrow or [Day after]?"

"I don't want to buy anything."

"No worries. It's not for you to buy anything at all, it's just to get his/her training out of the way and if you feel it's something that might be helpful to people you know, maybe in the future you can just send him/her some referrals if anything. What's better for you tomorrow or [Day after]?"

Always give two choices, direct them to a date and time. "What's better for you, Wednesday or Thursday, weekday or weekend?"