



APPOINTMENT SETTING SCRIPT (QUANTITY)

"Hey Mary, this is John -- how are you today? Good! Well Mary, the reason I'm calling you is because my company sent out a little postcard to your house and you read it...filled it out and mailed it back to us and I just need to verify what you put on the card. I see here your age is 68 -- is that correct? Great...and I have your address as _____? Well Mary, anytime someone in your area mails one of these cards back, I'm the guy who receives it. I go out each day and see 8-10 people in your community and get them this information they requested. I'm calling you because I'm going to be out there tomorrow and was just wondering what a good time would be for me to get you this information...it will only take 4-5 minutes to go over it...is morning or afternoon usually better? Great Mary, again, my name is John and I'll be driving a white truck, and I'll see you sometime between 4:00 and 5:00 tomorrow!"

TIPS:

- When you ask them how they're doing, listen to them and respond. If someone says, "I'm good...just wore out from working in the garden all day!" I would say "I can definitely understand that! My dad plants 8 acres every year and it will wear you down!" Just anything to not be like every person that calls their phone each day.
- **DO NOT PAUSE** in the first paragraph when you say you need to verify what they put on the card. Once you say they wrote their age as _____ not pausing will stop a lot of people who will tell you they didn't send it back or they will ask "What Card?" if you pause and allow them. But once you confirm their correct info, they automatically assume they did fill it out (which they obviously did!)
- If they have a spouse, make sure they can both be present for the appointment
- REMEMBER, you don't need to go into a bunch of detail. Just get the appointment and go over the details when you get there.



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"Hey Mary, this is John -- how are you today? Good! Well Mary, the reason I'm calling you is because my company sent out a little postcard to your house and you read it...filled it out and mailed it back to us and I just need to verify what you put on the card. I see here your age is 68 -- is that correct? Great...and I have your address as _____?"

Ok perfect! Were you wanting to receive the information for just yourself, or you and another loved one? Ok great! And Mary, were you wanting to receive the information for burial plans or for cremation plans?

Well Mary, anytime someone in your area mails one of these cards back, I'm the guy who receives it. I go out each day and see 8-10 people in your community and get them this information they requested. I'm calling you because I'm going to be out there tomorrow and was just wondering what a good time would be for me to get you this information...it will only take 4-5 minutes to go over it...is morning or afternoon usually better? Great Mary, again, my name is John and I'll be driving a white truck, and I'll see you sometime between 4:00 and 5:00 tomorrow!"

TIPS/ADDITIONS TO SCRIPT:

- If the appointment is not close to you, you can try to lock down the appointment. You can do that by doing one of the following:
 - 1 – Getting them to grab a pen and paper to write down your name and time.
 - 2 – By adding in a lock down like, "Now Mary, I am required to get this information out to you, and you said 2:00 would be the best time. I get in trouble if too many people do not show for appointments, so is there any reason at all you can think of that would cause you to not be home at 2:00 tomorrow?"
- When you ask them how they're doing, listen to them and respond. If someone says, "I'm good...just wore out from working in the garden all day!" I would say "I can definitely understand that! My dad plants 8 acres every year and it will wear you down!" Just anything to not be like every person that calls their phone each day.



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COMMON OBJECTIONS AND REBUTTALS

WHAT WAS THIS ABOUT AGAIN?

Mary, this was about the card you filled out regarding your final expenses, whenever someone does this, I just need to verify the information and I'll get you off the phone, now you said you're at 123 Main St., right?... *proceed to set*

I ALREADY HAVE INSURANCE

GREAT! You actually have to have insurance to qualify for many of these programs. Since you filled this card out, I just have to go over this with you real quick. It just takes a few minutes and if I can't help you, I'll get out of your hair. Is morning or afternoon better?

I'M NOT INTERESTED

That's ok, since you filled this card out, I have to drop this off real quick and go over it with you. It just takes a few minutes and if I can't help you, I'll get out of your hair. Is morning or afternoon better?

I'M BUSY ALL DAY

Usually, this means they have a doctor's appointment or something. Make sure to fact find a little bit, find a way to relate to them and then proceed to set... "No worries Miss Mary, they've got me working like crazy too. I've gotta see 10-12 people each day so it is just takes a few minutes. I'll have to give you the quick version, but I can squeeze you in at the end of the day. Is there any reason sometime between 5:00 and 6:00 wouldn't work?"

I CAN'T AFFORD IT



No worries, whenever someone fills this card out, I'm just supposed to go over this real quick. If I can't help you, I'll get out of your hair. Is morning or afternoon better?

IS THIS SOMETHING FOR FREE?

Well hopefully it's better than free. These programs were designed for folks on a fixed income and I put money back in seniors' pockets every day. Since you filled this card out, I just have to go over it real quick. If I can't help you, I'll get out of your hair. Is morning or afternoon better?