



### ***Field Sales Appointment Setting Script***

**{Agent}** - Hi "LEAD NAME" this is AGENT FIRST NAME and I am the local field underwriter in (city of the lead) responding to your request you made regarding the new state regulated life insurance programs.

I am going to be in your area and wanted to drop off the information for you. Does tomorrow or Wednesday work best for you?

**{Lead}** - Tomorrow ..... Or Wednesday.

**{Agent}** - Great. I can do 9am or 2pm. Which is best? (provide a morning or afternoon option with a specific time to lock in your firm appointment)

**{Lead}** - they confirm what is best.

**{Agent}** - Perfect. I will be by your home (at the agreed upon day and time) to drop off the information for you and review any questions you may have.

- Do you have any dogs or pets that I need to be aware of for safety reasons?
- See you tomorrow. Have a blessed day.

#### Goals for Dial/Appointment Setting Days:

1. **Book appointment(s)** - How many appointments do you need for a sit down? For new people use a 50/50 ratio. It takes 2 appointments to get one sit down.
2. **Book at least Twice as many appointments as your application goal.** - Example: If you want 3 applications a week you need to book 6+ appointments a week.

***REMEMBER - The #1 goal on your dial/appointment setting days is to book appointments. That's it! Book firm appointments to set yourself up for success.***