Referral phone script

Hi \_\_\_\_\_\_\_\_\_? Hi, I’m \_\_\_\_\_\_\_ how are you? (Response) My name is probably not going to sound familiar, we haven’t met yet. Did John tell you I was going to give you a call? He/she/they didn’t give you a heads up? Ok, so you probably wondering who the heck I am. (hahahaha) Did I interrupt anything super important? Great.

The reason I’m calling, I do some supplemental plans for John and Sarah and he asked me to give you a call, to give you the quick 30 second version of what it is I do for him over the phone, if it sounds like something you’d want to take a look at, we can set a time to get together. If not, no big deal, I just promised John I would at least give you a call and share with you what I do for him. Sound fair?

So when I say supplemental plans, does that ring a bell, are you familiar with how those work? (Response) Yeah. The simple version is, health insurance pays the doctor bills and hospital charges when something happens. I don’t handle that type of insurance. The plans I do for John, instead of paying doctor bills, would pay HIM, a cash benefit, if anything happened. Whether it was something simple like a broken bone, or even something serious like a critical illness (like Cancer or another critical illness), it pays cash directly to you to take care of YOUR bills. Does that make sense? (Response) Cool. A couple reasons John bought this is number 1, the plans are very affordable. Most people spend more on Direct TV or a nice night out to dinner, than they spend on this. It’s not 2, 3, 4, 500 dollars like health insurance. Second thing he liked is if John and Sarah stay healthy, and don’t need to use this, they get all of their money back. Kind of like a savings. So a lot of people like the fact that the coverage is there, God forbid you need it, but if you don’t, you’re not throwing your money away. Does that make sense? (Response)

So, what I do is just meet people at their house to go over all the details. What it costs, what it covers and how the money back works exactly. It takes about 15-20 minutes to go over the details. Does that sound like something you would spend 15 minutes taking a look at? YEAH! (I say 15-20 minutes because if they are not cool, it will only be that long)

Cool, what is typically the best time of day to catch you for 15-20 minutes, during the day or more in the evening?

Great, would tonight or tomorrow night work better for you? (Or, would Tuesday or Wednesday work better? Whatever the next 2 nights are)