

DISCOUNT CARD/ LIST LEAD PHONE SCRIPT

Hey (Name)!

It's (Your Name) with American Income, I'm sure you remember when we came out and went over those benefits through the union, right? Wow, looks like it has been a long time since we were out there, and some of those benefits you received have changed or expired. Do you still have your blue service folder with all of your benefits paperwork inside of it?

"YES" – Transition into POS script (if they were a POS but canceled their policies, continue with THIS script)

"NO" – Not a POS, continue with Script

The good news is, the company has picked up the cost of the benefits for the members & retirees, and we have updated a few as well! Also, they have revamped the whole program and added an additional \$2,000 for you and everyone within your household.

Here's the deal, I need to go over the updates with you and your family. We also need to make sure all the contact information and beneficiaries haven't changed. The good news is, we are not sending any agents out to member's homes anymore. We are doing everything virtually through Zoom. You have heard of Zoom before, right? Perfect. We will send you an email to get connected.

Unfortunately, I cannot do anything for you right now because I have a meeting coming up in about 10 minutes. Since there are a lot of you, and only one of me – it can be difficult to schedule everyone in before the end of the month, so let's coordinate a time that will work for the both of us. What time are you (and the spouse) typically getting home from work?

Perfect. Let me see what I can do for you... I have an availability at (Date,Time) or (Date,Time). I assume both of those work for you, which one would be best?

Now what is the best email address for me to send that Zoom invitation email to? Thank you! You will get an email a few minutes prior to our appointment.

Now go ahead and grab a pen and piece of paper, I need you to jot down some important info. Write down my name, our appointment date & time, and my number. Expect a call from me prior to our appointment, just to make sure you can connect without any problems.

Now _____ (name), is there any reason you can think of why _____ (date,time) wouldn't work for you (and spouse)? Okay great. Like I mentioned before, there are so many of you guys and only one of me, as you can imagine – my schedule fills up very quickly. With that being said, the worst thing that can happen is if someone doesn't show up for their appointment and I am having a Zoom party by myself (laugh). By reserving this time slot for you, I am taking it away from another member. So you are 100% positive that _____ (date,time) will work for you guys,

right? All I ask is if anything crazy happens, like a work or medical emergency, that you let me know ahead of time. If I don't hear from you, I will assume no news is good news and I will speak with you guys on/at _____ (date,time).

And if by chance, MY schedule gets a little backed up, I will send you a text to let you know! Thank you, _____(name). I look forward to speaking with you and _____(spouse) later!