

# HOW TO CLOSE OUR LEADS

## 12 POINT FOLLOW UP SYSTEM

### DAY 1

3 Calls  
1 Text  
1 Email

### DAY 2

2 Calls  
1 Text  
1 Email

### DAY 3

1 Call  
1 Text  
1 Email

**LEAVE 1 VOICEMAIL PER DAY & DOOR KNOCK UNREACHED LEADS**

6 CALLS  
EQUALS A 90%  
CHANCE OF  
CONTACT.

CALLING AT  
DIFFERENT  
TIMES OF  
THE DAY CAN  
DOUBLE YOUR  
CHANCES

80% OF SALES  
ARE MADE  
BETWEEN THE  
5TH AND 12TH  
CONTACT.

CALL FROM  
A DIFFERENT  
NUMBER IF  
YOU HAVEN'T  
MADE  
CONTACT

**For more on the 12 Point System**

**CLICK WATCH VIDEO TO LEARN MORE!**

# 5 BEST CALLING TIPS

## CALLING TIP 1

Assume the right person answered the phone. If the lead says “Betty Smith,” and a female answers the phone, then say “Hello, Betty.” However if a guy answers the phone, then say “Hello, Mr. Smith.” By asking or looking for someone it appears that you are a telemarketer or salesperson.

## CALLING TIP 2

Use your first name only. There is no reason to say your last name or company name as this will only create problems. This will either prompt them to ask “Who is YOUR COMPANY?” And they won’t remember your information anyway.

## CALLING TIP 3

Don’t ask “How are you?” This is a way for them to insert an objection and we never really care how they are doing anyway.

## CALLING TIP 4

Do not PAUSE! Pausing creates an awkward silence, and by doing this you are giving them permission to insert an objection here. Also, pausing shows a lack of confidence in you and your product. The only correct time to pause and not speak is after you’ve asked them a question.

## CALLING TIP 5

5. Sell a “Drop-Off” Time. Your only objective when you are calling leads is to get in front of them. You shouldn’t ask age, date of birth, health questions, give quotes, gauge interest, etc because this won’t be a good gauge of interest level anyway since they are naturally going to object to whatever you say. FYI, the prospect will forget about you only “dropping” something off...

# APPOINTMENT SETTING SCRIPT

## CALLING RULES

1. skip the “how are you” and “saying your last name or company name”
2. take control, do not pause during the 1st paragraph, only ad lib if they seem like they want you to\*
3. Always, always, always AGREE! Ignore and don't listen to any objections like:
  - I'm not interested, I don't have time, I have no money, I already have coverage, etc
  - They do not actually mean any of this, they are just used to saying this to a salesperson

## SCRIPT

Hello (*lead's first name*). [wait for confirmation]

Hey, this is (*your name*). I am getting back to you about your request for the new (*Final Expense, Medicare, Mortgage Protection, Life Ins*) information. I am the local field underwriter and I'll be out in your area on (*insert day*), should I drop this information off in the morning or in the afternoon? [set within the next 48 hours]  
Is (*insert time*) or (*insert time*) better?

And, are you still at \_\_\_\_? (*if not, okay let me update your address. Where is that?*)

Now (*leads first name*), I need some help from you. Describe your house for me, what color is it? Is it a house, trailer, or apartment? Any other special details so I can spot it...? Do I need any special directions? Or will I be able to use Google maps?

Hey do me a favor, grab a pen and paper real quick. I am putting you in my calendar now, so please go ahead and write down my name and (*insert appt time*). Thank you.

Well thank you for being so nice and for your time. I will see you \_\_ @ \_\_.

Have a great rest of your day. Goodbye.

# PITCH TEMPLATES

## VOICEMAIL

Hey (lead's first name), its (your first name) getting back to you about your request for the new information. I'm the local field underwriter in your area so call me back real quick to setup delivery. Thanks (lead's first name), again its (your first name) at (insert number).

## EMAIL

Hey (lead's first name), its (your first name) getting back to you about your request for the new information. I'm the local field underwriter and I'll be in your area on (insert day) so should I drop this off in the morning or the afternoon?

## TEXT

Hey (lead's first name), its (your first name) getting back to you about your request for the new information. I'm the local field underwriter and I'll be in your area on (insert day) so should I drop this off in the morning or the afternoon?

## DOOR-KNOCK PITCH

Hey (lead's first name), How are you? [Smile, be enthusiastic, and take a step back as you say this] My name is Cody. I'm getting back to you about your request for the new (final expense, Medicare mortgage protection, life ins) information. Now, I'm the local field underwriter and I was in your area so figured I'd drop it off and check you off the list. Can I come in for a quick second? [Start towards the door, look down, and wipe off your feet]  
Another Question Option: Should we sit on the couch or at the table?

**SECURE AGENT LEADS**

**INSURANCE LEADS**

# **LIVE CALL EXAMPLES**

**Watch LIVE call examples from Cody Askins. These leads can be called from ANYWHERE and set. It's that easy. Watch Cody Askins set appointments from Jamaica without a script.**

**Cody is LIVE every Monday, Wednesday, and Friday on Facebook and YouTube to bring you concrete value every insurance agent can use. It doesn't matter if you're new in the business, or a veteran agent. This industry is always evolving and Cody Askins is at the front on the pack. Watch any of the videos above for a sneak peek into what we are about. Don't forget to check out our YouTube where there is over 900 insurance related videos.**