

Setting Appointments with Older Leads

FINAL EXPENSE

When calling to set appointments or door knocking with an older lead, your "mindset" will be the key to determining success.

- 1) You must understand the SOLE purpose of your call (to get a commitment from the client for a date and time to show up at their door with a smile on your face and HOPE LIKE HELL THEY ANSWER)!! If you believe in your ability to create a sale or multiple sales once you are "face to face" with your prospect, then having the proper MINDSET when prospecting by phone should not be a problem!
- 2) You MUST be as brief as possible on the phone without sounding "rushed" or "hurried". Basically, DO NOT over qualify or attempt to gain "commitment" from client while on phone! Trust me here; your success at gaining commitment will be so much higher if you attempt it in person!
- 3) MOST COMMON OBJECTIONS with this type of lead.

a) **"We already took care of it"**

Response: "Great! Looking at the personal information you sent in, I'm sure you got the new type of coverage, not the old-style coverage that so many agents still try to sell you? (PAUSE)

The most common response will be "HUH" or "WHAT" or "I DON'T KNOW" or "HOW DO I TELL WHAT I HAVE?" This means you're in. Tell the client: "The important thing is that you are protected.

What I will do for you is what I do for everyone in this situation (THE TECHNIQUE WE ARE USING HERE IS CALLED "GREGARIOUS NATURE OF PEOPLE.") I'm already going to be out in your area today and also tomorrow seeing a number of other good folks like yourself. I'll just drop by while I'm out in the area and take a quick look at your policy and make sure you are receiving all the benefits you are entitled to. So which day works better for you?" ("both of you" if it's a couple) WAIT FOR AN ANSWER, THEY WILL GENERALLY (85% of the time) PICK A DAY BASED ON THE TWO (THE TECHNIQUE USED HERE IS CALLED "ALTERNATIVE CLOSE.")

Once they pick a day, say "Great... I have two times left (i.e. 10:15 and 2:15), which would you prefer?"

Note: It doesn't matter if your schedule is wide open, you need to make it look extremely packed and busy. Remember, perception is reality. Everyone wants to see the agent that is busy seeing everyone!!

They will pick a time. At this point tell them to mark it down for (repeat date and time). Tell them you are also marking it down for (repeat date and time) and then confirm address that is on the lead and close with "Great, see you (repeat date and time).

Note: Do not wait for them to go get a pen to write down date and time.

You don't want to empower them thus losing control. We repeat date and time at the close so much because we are not going to call to confirm the appointment, nor are we going to leave a phone number (unless of course we want a bunch of cancellations and/or no shows.)