



Premium Lead Solutions

EXCLUSIVE LEADS PROVIDER

Disability Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi [Prospect's Name], my name is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because we specialize in helping individuals protect their income with disability insurance. In the event of an illness or injury, disability insurance can provide you with a steady income to cover your expenses. I'd love to learn more about your needs and see how we can help you secure your financial future.

Can I ask you a few quick questions to better understand your situation?

Qualification Questions (For All Scenarios)

1. **Full Name:**
Could you please confirm your full name?
2. **Current Employment Status:**
Are you currently employed, self-employed, or retired?
3. **Occupation:**
What is your current occupation?
4. **Income Protection Needs:**
Are you primarily looking to protect your income in case of illness, injury, or both?
5. **Current Disability Coverage:**
Do you currently have disability insurance coverage through your employer or any other source?
 - If YES: Who is your provider, and when does your policy renew?
6. **Income and Expenses:**
What is your current monthly income, and how much of that would you need covered if you were unable to work?

7. Timeline for Decision:

Are you planning to secure disability insurance soon, or are you just exploring your options at the moment?

1. Callback Lead Handling (Disability Insurance)

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over your disability insurance options in more detail?

Step 2: Schedule a Callback

- When would be a convenient time for our licensed agent to call you back and discuss your coverage options?
 - Morning
 - Afternoon
 - Evening

Step 3: Verify Details

- Let me confirm your details to ensure the callback is scheduled properly:
 - Full Name
 - Employment Status
 - Occupation
 - Income Protection Needs
 - Current Disability Coverage (if applicable)
 - Income and Expenses
 - Timeline

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] at [Scheduled Time]. Please expect the call, and thank you for your time!
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2. In-Person Appointment Handling (Disability Insurance)

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our licensed agents to discuss your disability insurance needs and help you find the right plan. Would you be open to meeting with us?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
 - Option 1: [Date/Time]
 - Option 2: [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the appointment:
 - Full Name
 - Employment Status
 - Occupation
 - Income Protection Needs
 - Current Disability Coverage (if applicable)
 - Income and Expenses
 - Timeline

Step 4: Confirm the Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please let us know if anything changes.
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3. Live Transfer Handling (Disability Insurance)

Step 1: Live Transfer Introduction

- I can transfer you to one of our licensed agents right now, who can help you review your disability insurance options and find the best coverage to protect your income. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
 - Full Name
 - Employment Status
 - Occupation
 - Income Protection Needs
 - Current Disability Coverage (if applicable)
 - Income and Expenses
 - Timeline

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will go over your disability insurance options and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.
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Common Rebuttals (For All Scenarios)

- **Not Interested:**
"I understand, but disability insurance is a great way to protect your income in case of an unexpected illness or injury. Would you be open to exploring affordable options at a later time?"
 - **Already Have Disability Insurance:**
"That's great! Many of our clients already had coverage but found that we offered more comprehensive or cost-effective plans. Would you like to compare your current plan with what we can offer?"
 - **Can't Afford Insurance Right Now:**
"I understand. We offer flexible disability insurance plans that can fit within your budget while still providing important income protection. Would you be open to discussing those options?"
 - **How Did You Get My Information?:**
"We usually receive information through online inquiries or directories that help individuals find disability insurance options."
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Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
 2. Employment Status
 3. Occupation
 4. Income Protection Needs
 5. Current Disability Coverage (if applicable)
 6. Income and Expenses
 7. Timeline
 8. Next Steps (Callback, In-Person Appointment, or Live Transfer)
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Closing Statement

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best disability insurance plan to protect your income and secure your financial future. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!

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