

Life Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] with [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because you recently expressed interest in life insurance, which is a great way to protect your family and loved ones. We have some excellent options that can help you ensure they are financially secure. I'd love to provide more details and help you choose the right plan.

Before we proceed, I need to ask you a few quick questions to find the best policy for your needs.

Information Gathering (For All Scenarios)

1. Full Name

- Could you please confirm your full name?

2. Date of Birth

- May I ask your date of birth to ensure you qualify for the best plan?

3. Address

- Can I confirm your address to ensure we have your correct location?

4. Beneficiary

- Who would be the beneficiary of this policy (spouse, child, etc.)?

5. Coverage Amount

- What coverage amount are you considering? (e.g., \$100,000, \$250,000, \$500,000)

6. Smoker or Non-Smoker

- Are you currently a smoker or a non-smoker?

7. Active Checking or Savings Account

- Do you have an active checking or savings account for payment purposes?
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1. Callback Lead Handling (Life Insurance)

Step 1: Confirm Interest

- Are you still interested in learning more about life insurance to protect your loved ones?

Step 2: Schedule a Callback

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

Step 3: Verify Details

- Let me confirm the details so we can schedule your callback:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Plan
 - Smoker/Non-Smoker Status
 - Checking/Savings Account

Step 4: Close the Conversation

- Perfect! You'll receive a call from our agent [Agent Name] on [Scheduled Time]. They will go over the best life insurance options for you. Thank you for your time, and please expect the call!
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2. In-Person Appointment Handling (Life Insurance)

Step 1: Build Interest for In-Person

- If you'd prefer, we can set up an in-person meeting with one of our licensed agents to go over the life insurance plan options and help you select the best one. Would that work for you?

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 go over your information to ensure everything is set for the meeting:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Plan
 - Smoker/Non-Smoker Status
 - Checking/Savings Account

Step 4: Confirm Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. They will walk you through the available options and help you find the right coverage for your needs.
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3. Live Transfer Handling (Life Insurance)

Step 1: Live Transfer Introduction

- Since you're interested, I can transfer you to a specialist right now who can walk you through the life insurance plan options in more detail. 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
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Plan
 - Smoker/Non-Smoker Status

- Checking/Savings Account

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will assist you with the life insurance options and answer any questions you have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly, and they will take it from here.
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Common Rebuttals (For All Scenarios)

- **Not Interested**
"I understand, but life insurance is one of the best ways to protect your loved ones in case of an unexpected event. Would you be open to a quick callback to discuss affordable options?"
 - **Already Have Life Insurance**
"That's great! Many of our clients already had insurance, but we helped them find better coverage or lower premiums. Would you be interested in comparing options to see if we can save you money?"
 - **Can't Afford Life Insurance Right Now**
"I understand. The good news is that we have life insurance plans starting as low as \$1 per day. Could we set up a quick call to go over the options?"
 - **How Did You Get My Information?**
"We usually receive information through online requests or from databases that help individuals like yourself learn about life insurance."
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Final Confirmation (For All Scenarios)

Before ending the conversation, ensure you confirm the following details:

1. Full Name
2. Date of Birth
3. Address
4. Beneficiary
5. Coverage Plan
6. Smoker/Non-Smoker Status
7. Active Checking or Savings Account
8. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best life insurance plan to protect your family and loved ones. If you have any questions, feel free to reach out to us at [Phone Number]. Have a wonderful day!

Premium Lead Solutions