

Script:

Hey Bob, Hey this is [Agent Name] (I know it's been a while), I am doing this insurance thing, and I assume you guys already have insurance, can I come over and practice reviewing it and practice what I'm supposed to say? What's your schedule like over the next couple of days?

Sure.

Schedule a time 24-48 hours out.

- If married, confirm both will be there. Now you're married, right? Is [Name] going to be there too? I'm supposed to practice like it's real.
- If they have insurance, ask them if they can have policies out so you can actually review them.
- If they have insurance but don't know where the policies are, try and book it during the day when the carrier's office will be open so you can call in. (This is what you will actually do with clients).
- If it's through their job, it doesn't matter because they probably can't take it anyways, but you can go over that.

Not really interested.

That's okay, I just need to practice reviewing and using my quoting software and what to say, what are you guys doing tomorrow?

I already have insurance.

Yeah, I figured you already do, I just need to practice reviewing, using my quoting software, and what to say, what are you guys doing tomorrow?

You are going to try and actually help them, meaning you're going to treat it like a real appointment. There is no point in practicing doing it wrong, we are going to practice doing it right. In sports when you have a practice, you don't practice it to not run the play correctly, you practice it to actually run the play.

Again remember, you can help them with virtually anything. But you're not trying to "sell" them on the phone, you're trying to book a time so you can better understand their situation. Insurance is not a hard close, this is not a "hard close." This is an understand their situation and see if you can improve it appointment.