

TEXTS TO USE FOR CLIENT CONVERSATIONS-

MISSED APPOINTMENT TEXTS TO PUT IN ZEEPO (TEXT TEMPLATES) OR TO USE ON YOUR PERSONAL PHONE:

Missed appointment text:

"Looks like we missed our scheduled appointment 😞 If you would give me a call at your earliest convenience or if you need to reschedule, please let me know 👍"

Next day:

"Good morning, ____! It's (agent), and it looks like we missed our appointment (day). By any chance you have a few minutes today or sometime this week we could chat regarding the life policy options available to you?"

Next day:

"Hey ____ ! I'm just following up with you to see if you figured out what day/time would be best for you to go over your options of protecting your future legacy. Hope all is well!"

Day 4:

"Are you interested in creating generational wealth and going over your options? If not, let me know. That way I can release your file to the other agents. Thanks!"

Follow up if on READ:

"Hey (client). I tried reaching you multiple times as per YOUR request. I see that you read my messages and I understand life gets in the way at times however, just as your time is valuable, my time is as well. Should I continue to follow up with you? With respect to my time and yours, please let me know. I look forward to your response."

Final text if they continue to ghost:

"Hey xxx,

I just wanted to check in with you. I like to balance out excellent customer service without being annoying and I'm starting to feel like a hassle to you.

Should I continue to reach out, or leave you alone? I care about you being safe and saving, but I don't want to be pushy.

Just let me know if you need anything. Have a beautiful day my friend!"

GREAT CONVERSATION MESSAGES TO RESPOND BACK TO IN ZEEPO OR PERSONAL PHONE:

If client responds in Zeepo "Who is this again?" -

(INPUT THIS INTRO TEXT AND SAVE INTO TEXT TEMPLATES):

"Good ____, {{contact.first_name}}! This is Nisha, (life advisor/expert/etc) with Insurance Elevated and just found time to get back to you about your information that was submitted to our social media site about creating generational wealth. Feel free to check out our FB page -

www.facebook.com/elevatedfinancialgroup

Are you looking for yourself or your children as well?"

attach business card

If client responds in Zeepo with the following.....

SEND ME AN EMAIL WITH QUOTES(JUST REFER TO "LOOKING FOR QUOTES"):

◦ (CLIENT NAME), I CAN CERTAINLY GET THAT OVER TO YOU HOWEVER, I AM NOT QUITE SURE I CAN HELP YOU JUST YET. I DO HAVE TO ASK YOU A FEW QUALIFYING QUESTIONS. LIFE INSURANCE IS NOT A ONE SIZE FIT ALL SOLUTION. *TRANSITION INTO CNA*

GOT IT TAKEN CARE OF:

◦ GREAT! THAT IS EXACTLY WHY I AM CALLING (NAME). MY JOB IS A LITTLE DIFFERENT THAN THE AGENTS. I AM JUST HERE TO MAKE SURE YOU WERE PLACED IN THE BEST POSITION AND TO MAKE SURE YOU UNDERSTAND WHAT YOUR POLICY ENTAILS. (ELABORATE ON IM THE GOOD NEWS GUY, AND I HAVE A FIDUCIARY RESPONSIBILITY) NOW, DID YOU GO WITH A TERM OR WHOLE LIFE POLICY?

LOOKING FOR QUOTES:

◦ (CLIENT NAME), I CAN CERTAINLY GET THAT OVER TO YOU HOWEVER, I AM NOT QUITE SURE I CAN HELP YOU JUST YET. I DO HAVE TO ASK YOU A FEW QUALIFYING QUESTIONS. LIFE INSURANCE IS NOT A ONE SIZE FIT ALL SOLUTION. (ELABORATE ON DOING A DISSERVICE /DOING WRONG BY THE CLIENT BC YOU WORK WITH SO MANY CARRIERS AND THEY ALL HAVE DIFFERENT UNDERWRITING GUIDELINES.)*TRANSITION INTO QUALIFYING QUESTIONS*

NOT INTERESTED/LOSE MY NUMBER:

◦ OHH!(SURPRISED TONALITY) OH, YEAH I APOLOGIZE I DIDN'T MEAN TO OFFEND YOU (NAME) JUST SO YOU'RE AWARE I'M NOT QUITE SURE WE CAN EVEN HELP YOU JUST YET. WE WOULD HAVE TO UNDERSTAND A LITTLE BIT MORE ABOUT YOUR SITUATION JUST TO SEE IF WE CAN EVEN HELP YOU. AND IF YOU FEEL LIKE WE CAN'T, WE CAN JUST END THE CALL AT THAT POINT OR IF YOU COULD, WE CAN CONTINUE THE CONVERSATION. WOULD YOU BE OPPOSED TO THAT?

I DON'T NEED IT:

◦ NOT A PROBLEM, I CAN CERTAINLY UPDATE YOUR CASE FILE BUT TO MAKE SURE I AM PUTTING IN THE CORRECT INFORMATION DID YOU ALREADY SUBMIT AN APPLICATION FOR A POLICY AND NOT GET APPROVED? OR WAS IT BECAUSE YOUR BUDGET WAS NOT MET (ENOUGH VALUE NOT PROVIDED)?

I WANT TO KEEP SHOPPING:

◦ ABSOLUTELY, THE THING ABOUT LIFE INSURANCE IS THAT ITS NOT SOMETHING YOU CAN JUST PURCHASE. IT IS ULTIMATELY UP TO INSURANCE COMPANY TO SAY YES. NOW WHEN YOU SAY YOU WANT TO KEEP SHOPPING, IS IT BECAUSE WE HAVEN'T MET YOUR BUDGET OR THE AMOUNT OF THE BENEFIT YOU ARE LOOKING TO GET TO PROTECT YOUR FAMILY?

I NEVER REQUESTED ANYTHING/ I DON'T REMEMBER FILLING THAT OUT:

◦ (JOKING/FUNNY TONALITY)

NOT A PROBLEM (CLIENT NAME) IF YOU ARE ANYTHING LIKE ME I DON'T REMEMBER WHAT I HAD FOR BREAKFAST THE OTHER DAY YOU KNOW? NOW I HAVE YOU DOB AS _____, CORRECT?

I NEED TO THINK ABOUT IT:

◦ (CLIENT NAME), HOW DO YOU MEAN BY I NEED TO THINK ABOUT? AT THE END OF THE DAY IT'S ULTIMATELY UP TO THE INSURANCE COMPANY TO APPROVE YOU AND THE REASON WHY YOU SUBMITTED YOUR REQUEST WAS TO PROTECT YOUR FAMILY IN THE EVENT OF YOUR PASSING. TYPICALLY WHEN PEOPLE TELL ME I NEED TO THINK ABOUT IT IS BECAUSE I HAVEN'T FOUND WHAT THEY WOULD LIKE TO INVEST EACH MONTH INTO A POLICY. NOW WAS IT BECAUSE OF THAT OR DID I MISS SOMETHING ELSE? BECAUSE AT THE END OF THE DAY I AM TEAM YOU NOT TEAM INSURANCE.

I CAN'T AFFORD IT:

◦ NOT A PROBLEM. WE WANT TO MAKE SURE YOU HAVE SOMETHING IN PLACE SO WE DON'T LEAVE THAT BURDEN ON YOUR FAMILY WHEN THAT TIME COMES. WHAT WE CAN DO IS ADJUST THE BENEFIT AND FIND WHAT MAKES MORE SENSE TO MAKE SURE YOUR FAMILY IS PROTECTED BECAUSE HAVING SOMETHING IN PLACE IS BETTER THAN NOTHING. WOULD'T YOU AGREE?

TRANSITION INTO OFFERING ANOTHER OPTION

I need more time to make a decision:

-I totally get it. However, it doesn't take time to make decisions, it takes information and the issue is, that the longer we wait, the more information we're going to have. I'm your source of information that you have RIGHT now to make this decision and I truly want to do whatever necessary to help you get your family protected.

So what are your main concerns?