

How to Win on the Phones

Goal:

- Full-time agents: 20-25 appointments per week will produce \$5K-15K+ in app premium a week.
- Part-time agents: 10-12 appointments per week will produce \$2K-\$7K+ in app premium a week.

Keys to being successful on the phone

- Attitude – Keep a positive winning mindset. Don't take the calls personal or get emotional.
- Be Consistent and Protect your dial time. – Regardless if you are full-time or part-time, Commit to consistent dial time each week and don't let life's chaos steal that time and opportunity from you.
- Remember you can't lose a deal you don't have. When making calls don't be afraid to push it, you don't have the deal yet so it is impossible to lose.
- Buy leads every week to keep your inventory up.
- Dial about 48 hours before the appointment time
- If you can book 1 appointment you can book 25 by dialing more.
- Don't stop dialing until you reach your appointment goal.

Metrics based on lead type:

You'll make approximately 25 to 30 dials per hour. Close ratio once you sit with the client is the same regardless of lead type. The following are estimates to set realistic expectations for yourself.

- A leads: You'll book 8 out of 10 contacts
- 90-day bonus leads: For every 4 to 5 contacts book 1 appointment
- 120-day bonus leads: For every 5 to 7 contacts book 1 appointment
- 12-month bonus leads: For every 7 -8 contacts book 1 appointment
- 18-month bonus leads: For every 10-12 contacts book 1 appointment

Phone Script

- Follow the mortgage protection or final expense script based on the lead type you are calling.
- Speak slow and low. .
- Master the phone scripts, rebuttals and maintain control of the conversation.
 - Deflection – “That's exactly why I'm calling”

Dialing a lead

- We dial each phone number 3 times to increase our contact ratio which increases the number of appointments booked.
- Dial each number 3 times.
- A Contact is defined as speaking with the person who is on the lead

When to Dial

- Dial Monday for appointments on Tuesday and Wednesday. Dial on Thursday for Friday and Saturday and Sunday if necessary.

Tracking your calls and objections

- Track your progress and results with the call tracker form.
- If you are just starting out write down each objection that you get so your manager/mentor can provide feedback and coaching to help you improve.
- If you are getting a hold of people but are not booking appointments. Stop! Contact your manager/mentor to discuss with them what needs to be corrected to improve your appointment setting.