

Appointment Booking Script

(Hello?) Alex. Alan here. I got the letter that you sent me about the mortgage on your house for \$150,000. The reason for my call today is because I'm the field underwriter who comes out and shows you how this thing works. Now I can only give you 15 or 20 minutes of my time tomorrow. Does morning or afternoon work better for you.

(Morning.) Morning. Excellent. And when you say morning, are you talking 8 to 10, or 10 to 12. *(10 to 12.)* 10 to 12. Super.

(Afternoon.) Afternoon. And when you say afternoon, are you talking 12 to 2, or 2 to 4. *(2 to 4.)* 2 to 4's perfect.

(Evening.) Evening. And when you say evening, are you talking 6 to 8 or 8 to 10. *(8 to 10.)* 8 to 10's perfect.

OK your address is 123 Main Street in Titusville, is that correct? *(Yeah.)* OK great. And when I'm driving down the road, are you on the right or on the left. *(Left.)* OK super, so when I drive up to your house, is the number on the house or on the mailbox or both. *(It's on both.)* It's on both? OK super. And will there be a car in the driveway? *(Yes.)* What kind of car and what color. *(98 Camry.)* Perfect. So when I get there, is it OK if I park in your driveway? *(Yes.)* Well, I always want to ask before. I don't want to assume anything, and I don't know what the parking is over there. So, do you have a pen and a piece of paper handy? *(I'm ready.)* OK super. My name is Alan A-L-A-N last name is Hooley H-O-O-L-E-Y. Your confirmation number is P as in Paul 2-0-1-5 0-0-5 [Add 5 for each appt booked in 2015.] *(P2015 135.)* Excellent.

And we agreed to 10 o'clock? *(Yeah.)* OK so I'll be there between 10 and 12. Because of traffic I like to leave a window. So I'll get there as quickly as I can and I'm looking forward to it.

Now on this letter, you didn't list a spouse. Are you married? *(Yes I am.)* Alright will she be there at the appointment? *(Does she have to be there?)* Yeah, she really needs to be there. The reason is, she's gonna ask questions that you wouldn't think of, and you're gonna ask questions that she wouldn't think of, and she'll probably be the beneficiary, correct? *(Yes.)* OK so I wanna make sure that she knows what we're doing, OK? *(OK.)*

OK super I'll see you between 10 and 12 tomorrow. *(Ok.)* Bye Bye.

2nd Time Talking To Someone—Supervisor Script

(Hello.) Alex. Alex. Hey, Alan. My name's Alan. I'm a supervisor with the company. And I got a letter that they put on my desk. I'm doing an investigation...on this. Our records indicate that you hadn't gotten the mortgage protection that you had requested. Do you remember sending that back to us? *(Sigh, what is this again?)* This is mortgage protection. You had sent us back a letter, and I'm a supervisor doing an investigation on this. I've got an agent that's gonna be out in the area tomorrow? He can only give you about 10 or 15 minutes because I've really loaded him down with a lot of these. Which works better, morning or afternoon.

Objections

(We already got insurance.) You already have insurance? Great, that makes my job that much easier. You had sent this back to us, and I'm here to get the information out to you. Which works better, morning or afternoon.

(I never sent anything in.) Oh that's fine, I hear that all the time. I don't remember what I had for breakfast this morning, so not a problem. I've got your signature here, I'll show it to you when I come out to see you. Which works better, morning or afternoon.

(Really, I filled this out?) Yeah, I've got your signature on it. You had sent it back to us. It's about mortgage protection. In the event of death, it would pay off the mortgage. Which works better, morning or afternoon.

(Well, we've changed our minds.) You changed your mind. And why'd you change your mind? (We just don't just want that anymore.) OK do you remember sending the form back in? (No.) You don't remember sen...well that might be the problem. Look, I've got your signature right here. I'm gonna be out in your area, I'll be more than happy to show it to you. Does morning or afternoon work better for you.

(I'm really busy, I'm not gonna be around.) I'm really busy too. So I can only give you 15 or 20 minutes of my time. Which works better, morning or afternoon.

(What company is this?) Mortgage Protection Center. Mutual of Omaha. Which works better for you, morning or afternoon.