



**GORDON**MARKETING

**800-388-8342**

## **The Essence of a Successful Phone Call**

- 1. Name recognition**
- 2. Introduce yourself**
- 3. Why I am calling/ who I am with**
- 4. Get 4-5 “Yes” answers**
- 5. My role for our company**
- 6. Offer one specific time and date (within the next 48 hours) to set up your visit**
- 7. Lock down your visit**

### Responder’s Name

Hi Tom?, my name is Tim Lankford, I am following up on the letter you sent in, in reference to your mortgage with Name of Mortgage Co./ Bank. It’s the protection where your house is paid off in the event of your death, or if you get sick or injured we make your mortgage payments, do you remember the letter? I just need to confirm a couple of things on this letter;

1. Your full name is \_\_\_\_\_
2. You gave us # \_\_\_\_\_ to call
3. Your date of birth \_\_\_\_\_

4. Co-buyer/ Spouse's date of birth \_\_\_\_\_
5. Your mortgage amount \_\_\_\_\_
6. Address is \_\_\_\_\_

My role for our Company is to personally go over these options with you and your wife/husband/ sig. other (Co-buyer) and give you a customized quote. We only need 10-15 minutes together. I have a \_\_\_\_\_ on \_\_\_\_\_ available. How does that work for you and \_\_\_\_\_?

**WFA**.....set that appointment or if that time doesn't work, ask; "Is it better earlier in the day or later for us to get together?"

### These Steps Are Crucial:

1. Do not set your appointments *beyond* 48 hrs.
2. Verify both parties (if there are two) will be present.... no one-legged appointments
3. Lock down appointment; "My GPS does a good job but sometimes it need help, what's a major intersection closest to your house?"
4. "As I am driving on \_\_\_\_\_ street, is your address on the mailbox and on your house?"
5. "What color is your house?"

Great, let me make sure I didn't double-book my time slots. We said Saturday, what time?" .... *(you know the time, you just want to hear him/her repeat it)*

6. Book minimally every 2 hour time slots; 8, 10, 12, 2, 4, 6 and 8

# DON'T DO THIS:

- Don't sell insurance !“Isn't this just life insurance?”  
They responded to a Mortgage Protection request, keep the focus
- Are you with the bank?  
**DON'T SAY YES!**  
If asked, you respond; “I am with the Mortgage Protection Center, we work with our clients who fill out one of these letters.”
- Forget to lock down your appointment  
**NO ONE-LEGGERS!**

## How to meet the 2 most common objections:

### #1 “I don't remember mailing the letter”

I understand Mr./Mrs.\_\_\_\_\_. I don't remember some things I did yesterday, much less last week. The card was telling you that the government would only pay \$255.00 for funeral and final expense and that we have a program that will pay up to \$10,000.00. You gave your age (birthday) as \_\_\_\_\_.” (finish phone script)

I can appreciate that. With everything that comes in the mail nowadays, it's easy to get confused. This is about is a special seniors program to help you pay for funerals and final expense. On the card, you listed your birthday as \_\_\_\_\_ (*finish phone script*)

Mr./Mrs. \_\_\_\_\_, I can appreciate that. Maybe it was a loved one and not you that mailed the card in. I know sometimes my wife mails in for things she wants me to take a look at. Is your date of birth \_\_\_\_\_. (*set app't*).

## #2 “I wanted it in the mail”

Yes, Mr./Mrs. \_\_\_\_\_ I understand, however this program is highly regulated by the state. Because there is no health examination required, and we offer immediate coverage with special pricing, we are required to stop by for about five or ten minutes to discuss the benefits and options that you may be eligible for. When would be the best time to see you, morning or afternoon?

Yes, Mr./Mrs. \_\_\_\_\_, I understand. There are a lot of companies that only do business by mail. The problem is, their policies have limited benefits for the first two or three years. Our policies, if you qualify, are full benefit from the first day. Have you had any major health problems such as heart attack, stroke, or cancer? (*back to phone script*)