

CALLING EXISTING CLIENTS - RESERVICING:

IF YOU ARE THE AGENT:

Hey (Client name), this is (your name) with Globe Life Family Heritage Division. My name may or may not ring a bell however, I was calling because the company asks us to reach out to our clients after (number of years they've had the coverage) years. Most people remember that they bought something or see a draft come out every month, but they forgot what coverage they have. I wanted to reach out to schedule a policy review to see if we owe you any money, make sure you know what you have and share with you what's new. I will be in your area next week, does it make sense to include (insert spouse's name)? Would you prefer to meet at your place of work or at home? Great. Is Monday or Wednesday better? Mornings or afternoons?

IF BUSINESS:

Great - what is the address of the business? They only give us home addresses. Perfect. Could you please meet me at the front?

IF YOU ARE CALLING ON BEHALF OF AN AGENT:

Hey (clients name), this is Lindsay Lyder with Globe Life Family Heritage Division. How are you doing today? I am an administrative assistant for your agent (name). It looks like you have an _____ policy with us. Does that sound right? Great. Well I don't want to take up too much of your time. Do you have a couple of minutes? Perfect.

(Agent Name) wanted me to reach out, he/she likes to schedule policy reviews (number of years they've had the coverage) years to make sure people know what they have, see if we might owe them any money and share what's new. (Agent name) will be in your area (or name of town) next week, would it be better to meet at work or at home? Is Monday or Wednesday better? Great. Morning or afternoon? Does 9am or 10am work best?

IF BUSINESS - after choosing a time:

Great - what is the address of the business? We only have your home address. Perfect. Could you please meet (agent name) at the front of the building at (time)?

Perfect. I have you scheduled for Wednesday at 10AM. Do you mind if I send you a text message with this information so that you can put it into your calendar? OR Great, I have you scheduled for 10AM on Wednesday - could you pull up your calendar quickly on your phone? OR What's your email address? I'll send you a calendar invite.

Have a great day and I know (agent) is looking forward to seeing you again.

VOICEMAIL -

Hey _____, this is Lindsay Lyder with Globe Life Family Heritage. I'm giving you a call on behalf of your agent _____. I have a couple of questions for you, please give me a call back when you can. Thank you and I look forward to hearing from you.

TEXT MESSAGE -

Hi _____. This is Lindsay Lyder with Globe Life Family Heritage. I am calling on behalf of your agent Jake Wunder. Please give me a call back when you're able to. Thank you.