

Referral Phone Script

If you have a qualification card:

“Hello, may I speak to _____? This is (Agents Name). I’m calling regarding the card that (Nominator/Client) sent you, did you receive it?”

Great, (Nominator/Client) was impressed by what we were able to do for them and they asked that we send that card to you as an introduction to us.

Is Monday or Tuesday better for you?”

EVERYTHING depends on CREDIBILITY!

No Qualification Card:

“Hello, may I speak to _____? This is (Agent’s Name). I’m calling you because I just helped (Nominator/Client) with some (type) insurance. They didn’t know if you would be interested or not, but they were impressed with what we where able to help them with and wanted you to meet with me.

Would Monday or Tuesday be better for you? Morning or afternoon?”

EVERYTHING depends on CREDIBILITY!