Initial Contact Script for Insurance Advisor

**Client Onboarding STEP 3**

Use the following telephone script as a guide to assist you with making initial contact.

This call may also be in-bound from someone who has been referred to you and if so, pick up the script where appropriate.

* May I speak with [Potential New Client] please?
* Thank you, [Potential New Client]. This is [your name] calling from [Credit Union/Organization].
* The reason I am calling is that [Referrer Name] told us you would be interested in learning more about our Insurance Solutions and how they might help you.
* At [Credit Union/Organization] we have a process we follow when meeting with new clients to ensure everyone is on the same page with respect to what you are looking for and what we can provide.
* There is a great deal of misunderstanding about Insurance Solutions in general, in terms of how it works, how much it costs, and how to get started.
* We will be sure to cover that with you during our process and answer any questions you might have.
* It’s important to us that we not only meet your needs, but that we also deliver meaningful value to you and your family/business.
* The first thing [Potential New Client] is for us to set up an introductory meeting where we both meet and learn more about each other.
* This first appointment is about 45 minutes long and provides an excellent opportunity for each of us to determine FIT.
* I want to stress that no decisions will be made at this first meeting.
* Our philosophy is that the best decisions are made in a thoughtful, unrushed manner, so we feel it is important for both of us take our time to carefully assess everything we learn together.
* Let’s go ahead and schedule a day and time that works for us.

Schedule appointment in accordance with your Client Meeting Protocol.

* I’m going to send you an email confirmation with details of the appointment and if you have any questions, please let me know.
* Thank you for your time today [Potential New Client].
* I look forward to meeting you.