

B2B-Survey Appointment Script

Hey is this _____? This is Kevin with Family Heritage. I'm the one in charge of that new benefit at _____. Did I catch you with 60 seconds free? Great. After someone fills out one of those surveys (memos), my job is to schedule a time to get together with you to explain the details of our plans, basically explain your options. It takes about 15-20 minutes to cover that.

Couple quick questions...Are you a married guy, single, kids, what's your family situation? If married...Now every family is a little different, sometimes the husband handles these kinds of things sometimes it's the wife and in most cases it's "we do this stuff together"...How does it work for you guys?

Great, when is the best time to catch you both for 20 minutes, during the day or evening?

....Schedule appt...

once the appointment is set...

Hey just so you know how tomorrow will go. It will take 15-20 min to walk through the details and you're either going to say, yeah this is something I want or not. If you like it the paperwork takes a couple min and if not no big deal.

Also, if anything comes up, I'm human and I realize things come up, this is my cell phone, call me and let me know. I'll be sure to extend the same courtesy to you.