

Warm Practice Appointment Script

(name), how's it going? (brief small talk)

Let me tell you the reason for my call. I don't know if I've told you this, but I've started working with a new company working with different financial products, like insurance and retirement protection and stuff.

The company I'm working with, they have clients already set up for me to meet starting next week. The reason I'm calling is I need some help. What they have asked me to do is to practice my client interaction, policy reviews and my presentation to a few people I know, before I start working with real clients.

I was hoping that you could help me go through my presentation with you and (spouse's name) and help me practice what I'm going to be doing with these clients next week. Is that something you all could help me with? (wait for answer)

If yes: Great! Basically what I need to do is sit down with both of you in the next day or two. I have some time (DAY and (DAY)).

Which day works better for you and (spouse's name)?

Perfect and if you guys have any policies, you may not need anything and my job isn't to try and sell you something, but to just learn about the types of policies and walk through my presentation. If you have any and can have it out, I'm going to learn a lot, that would be awesome.

Overcoming situation: "we already have life insurance; I don't know if we need anything":

That's awesome! That actually makes it a really good practice appointment for me because my job is to actually learn about what other coverage people have and how to review it, not trying to push a product, because they have clients that I'll be meeting with that need coverage. This is just learning for me.