**VN095 – Plan Ahead Kit Head Start**

* Assign Leads ASAP, and text agent letting them know.
* Good for 1st shift calls
* Make for excellent “referral seeds”.
* Zero leads come through this system that didn’t request it. Take comfort knowing that they 100% did request.

**Phone Setting:**

* Two Part Program:
  + Part One is to protect your kids should god-forbid something happen to them.
  + Part Two is to protect your kids should something happen to you.
* “I don’t remember filling this out.”
  + You’re probably very busy with a lot going on and we've probably taken a while to get that to you. I'm so sorry for that. Since I know you're busy I'll make it quick…
  + You remember when you were thinking recently about protecting your kids? That's probably when you filled this out, and it’s exactly why I’m calling.
* With VN095 – Plan Ahead Kit
  + You already received an email with the Plan Ahead Kit, can you confirm you received that?
* Follow up missed calls with a text message, including a screenshot of the website (planaheadkit.com) and a Calendly link. (Example A below)
* If/when clients book themselves through Calendly, follow up immediately with a text including a Zoom link, and ask proactive questions to prevent a One Leg.

**Morning of the Appointment (Show Ratio Helper):**

* Send them a short video, with some positive energy, and give them a human to look forward to connecting with.

**Presentation:**

* Build Exclusivity: Are you in a union? Great! We work with some of the top unions in the country, and we love being able to provide those incredible benefits to others that might not have access.
* Be Fluid: if they thought this was Child Safe, pivot to that. If they mention health costs, pivot to AILPlus. If you have a Will Kit available and they mention the need, pivot to that.