**Headstart /*Headstart Organic Request***

No calls are to be made before 8:00 am or after 9:00 pm

Hi, this is \_\_\_\_\_\_\_ with American Income Life Insurance Company.  I’m calling because you requested information online (*from our website*) about our Children’s Life Insurance Program.  How are you doing today?

My job is to deliver your information, let you know what your family may qualify for and answer any questions you (and/or your spouse) may have, and the good news is we are now able to do this through video.

This should take about 25-45 minutes, depending on your questions. Now if you’re both available, we could take care of this right now*…(pause)*…or, I could squeeze you in tonight after you’re both done with work. I have an opening at (time) or (time), which one works best for you both?

Great, for the video chat, do you have a computer or tablet? Great, let’s go ahead and test that out. I’m going to email you a link so we can see each other, what’s your email address? *(Email your Zoom link, walk them through Joining Meeting, Start Presentation)*

**Set for Now**

*(If their device isn’t ideal, see Addendum for Best Practices.)*

Great, for the video chat, do you have a computer or tablet? Great, let’s go ahead and test that out. I’m going to email you a link so we can see each other, what’s your email address? *(Email your Zoom link, walk them through Joining Meeting)*

**Set for Later**

 *(Smile while saying)* If you are anything like me, you could have told me something 5 minutes ago and I got distracted and already forgot. So do me a favor and go into your phone and set an alarm for *(appointment time)*. That way you can be on time for me and I will do the same for you! *(Visually confirm they set the alarm)* And just for good measure I will send a reminder 15 minutes before our meeting. Do you prefer Text or Email? Look forward to seeing you *(and your spouse) (time/day of appointment)*

**Suggested Reminder Text/Email:**

Best practices:

* Within an hour of setting the appointment
* If next day, before 12:00 pm.
* 15 minutes prior to scheduled appointment
* Attach Virtual ID Badge
* If available, attach Return Card and Pre-Approach letter

Hello Client,

Friendly Reminder, This is *(agent name*) with American Income Life Insurance Company. We have a video meeting set up for *(day/time)* to review the information through *(lead source/name)*.  Below is the link to join the meeting. When you click the link it will automatically open the meeting.  I look forward to meeting with you!

Call me at *(agents phone)* if you have any issues.

“See” you soon!

**REBUTTALS**

Q. How long is this going to take?

A. It usually takes 25-45 minutes, depends on what questions you may have.

Q. Why can’t you mail it to me?

A. Now my job is to deliver and explain your information and be sure you have no questions. It’s a service we provide and I’ll also review other benefits available to you.

Q. Why does my spouse need to be there?

A. Should something happen, you and your spouse are the ones we will be dealing with. They need to understand how the coverage works and how to make a claim.

Q. I’m not interested.

A. Not a problem, but I’ll be happy to deliver the information and explain it to you, so you have it for your records. This way you’ll be able to start using our no-cost Health Services Discount Program right away, just for reaching out to us!

*(Note: On-line responses will be electronic versions of a response card and won’t help them visually refresh their memory. Remind them they filled it out on line at our secure site.)*