

Warm Market Script

Hey (Name), how are you?

Hey, I just wanted to reach out real quick.

I don't know if you knew, but I got my insurance license recently, and I'm gonna start working with clients and leads.

And my manager said, before I start working with people that I don't know, that I should probably run some practice appointments so I can get some practice in and get better before I do that.

And I wanted to reach out to you.. would you mind helping me practice?

Okay that's awesome it's definitely easier if we do it either in person or on Zoom probably will take about 30 minutes or so and if you guys need help of course I'll help you but really the goal is for me to practice so I don't sound crazy in front of real clients

Okay and what time do you guys get off of work tomorrow or what time would work tomorrow or the next day?

Pick a time....

Thank you I'm grateful I'm sure I'll reach out to my manager when I'm with you guys also and I appreciate the help.

Of course we can help for you guys need it then we'll figure that out as well okay.

Key Points for Agents (Read This Before Calling):

- **Do NOT try to sell on this call.**
The only goal is to book the appointment.
- **During the appointment, complete the FULL intake sheet.**
If you don't go through everything, it's not a real appointment.
- **Call from the home / office.**
Have your manager available to help guide and support you.
- **Always ask for feedback after the appointment.**
This is practice — the goal is to improve before working real leads.