



# Sales Training Series

## High-Face-Value Life Lead Script Suite

*Optimized for vague or high-face-value life insurance inquiries, such as \$500K–\$1M term quotes or online wealth protection requests*

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### Overview:

This script suite is designed for working leads who submitted generic life insurance or wealth protection inquiries — often through a term quote form or broad final expense/legacy planning ad. These leads tend to forget they filled anything out and may be skeptical at first contact. The approach here avoids hard “life insurance” talk upfront and uses casual, professional language that jogs memory, builds rapport, and positions the agent as a helpful guide — not a salesperson.

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### Phone Call Script (Live Answer)

#### Agent:

Hi [First Name], this is [Your Name] — I’m just getting back to you about that coverage request you submitted online a little while back. It was related to protecting your family or setting up a large benefit amount — maybe something like a \$500K or \$1 million quote?

**(pause)**

#### If YES or MAYBE:

Awesome — I’m the licensed agent assigned to follow up with you. My job is just to verify a few things on your file and walk you through what you may qualify for. It takes 15–20 minutes, and we’ll go over everything clearly before you make any decisions.

Would today or tomorrow work better for a quick call?

#### If NO or I DON’T REMEMBER:

Totally fair — a lot of people don’t remember right away. These things usually come through quick quote forms or ads online. I’ve got your file here with your name, city, and the requested amount — it’ll only take a few minutes to see if it’s still a fit.

Would today or tomorrow work better?



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## Close:

Perfect — I'll mark you down for [Day] at [Time]. I'll text over a confirmation. If anything comes up, feel free to call or text me directly. Talk soon!

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## Voicemail Script

Hi [First Name], this is [Your Name] — I'm just getting back to you about the online request you submitted about coverage for your family. It looks like you were looking into a higher benefit amount — I've got your file here and just need to verify a couple things.

I'll try you again soon, or you can call/text me at [Your Number]. Talk soon!

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## Text Message Sequence

### Initial Text Variations (After Missed Call)

#### ◆ Option 1 – Catch-All

Hi [First Name], this is [Your Name] — just getting back to you about the coverage request you sent in recently. I've got your file here and just need to verify a few quick things. When's a good time for a quick call?

#### ◆ Option 2 – Financial Protection Focus

Hi [First Name], this is [Your Name] following up on your recent request about financial protection options for your family. Just need to verify a couple quick things before we close the file. Got a few minutes to chat?

#### ◆ Option 3 – High Coverage Angle

Hey [First Name], this is [Your Name] — I'm following up on your request for a quote (looks like around \$1,000,000 in coverage). I just need to verify a few details to show what you may qualify for. When's good?

#### ◆ Option 4 – Legacy-Oriented

Hi [First Name], it's [Your Name]. I'm getting back to you about your recent request related to protecting your loved ones and leaving something behind. I've got your info here — just need a quick chat to go over the details.



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## Light Nudge (Day 2 or 3)

Hey [First Name], not trying to bug you — just making sure you got the info you were looking for. If you're still exploring options for coverage, I've got everything ready for you.

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## Final Soft Close (Day 3–5)

Hi [First Name], I'll go ahead and mark your file inactive unless I hear back. No problem either way — just didn't want to leave this unresolved in case you still had questions.

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## Email Template

**Subject:** Follow-Up on Your Coverage Request

Hi [First Name],

Just reaching out about a request you submitted recently regarding protection for your family — it looks like you were looking at term life coverage, possibly with a higher benefit amount.

I've got your file pulled up and just need to verify a few quick things to see what you might qualify for. If this is still something you're exploring, let me know when's a good time to connect.

You can reply here or reach me directly at [Your Number]. I'm happy to help however I can.

Warm regards,

[Your Full Name]

Licensed Agent

[Your Phone Number]

[Your Email]

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## Pro Tips for Working These Leads

### For This Lead Type:

- **Don't lead with "life insurance."** Use phrases like "coverage," "family protection," or "benefits" — they're less likely to trigger resistance.
- **Pause after the intro.** Give them time to process. If you talk too fast, they'll assume it's a sales call and hang up.
- **Expect memory gaps.** These leads often don't remember filling anything out. Normalize that with soft language like "These usually come through online or social media..."
- **Sound like a real human.** Be casual, friendly, and calm — not overly formal or robotic.
- **Be ready to pivot.** If they say they already have something in place, ask: "Do you remember who it's with?" to begin pre-qualifying.

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### For High-Face-Value Leads (\$500K–\$1M):

- **Reference the larger benefit.** It can jog memory and raise curiosity: "Looks like you requested something around \$500,000 or more?"
- **Don't assume wealth — assume responsibility.** Most people at this level are protecting income or family stability, not just assets.
- **Avoid product talk (e.g., IUL, term) unless they bring it up.** Stay focused on goals until the appointment.