**Cold Call Script**

Hi, It’s (Advisor Name) from **ClearBenefits.ca**, We are a web-based Group Benefits provider.

**Did I reach you at an ok time?**

1. **No** - When would be a better time to reach you?
2. **Yes** - Great, the reason I am calling is:

* We have exclusive medical / dental plans for:
  + small & medium size businesses
  + Businesses in your industry
* We recently sent you a keep-in-touch email
* We recently sent you several letters about employee benefits programs
* We previously **contacted** / **quoted** your company for group benefits

**Could you help me out?**

* Do you receive an email with a video link in it?
* Who would have received those emails / letters?
* I did not note who I spoke with, who would now handle a benefits plan for your office?
* It has been a while, who would now handle a benefits plan for your office?

Is \_\_\_\_\_\_\_ in?

1. **No** - When would be a better time to reach \_\_\_\_\_\_\_? Great. Before I call back, could I get \_\_\_\_\_\_\_’s email address so I can send the updated information package before I call back?
2. **Yes** - Great, is \_\_\_\_\_\_\_ available?

**Connected to the right person:**

Hi, \_\_\_\_\_\_? This is \_\_\_\_\_\_\_\_\_\_\_\_\_ calling from \_\_\_\_\_\_\_\_\_\_\_\_\_. Did I reach you at an ok time?

* I understand you would handle benefits for our office?
* We recently sent you a keep-in-touch email
* We recently sent you several letters about employee benefits programs
* We previously **contacted** / **quoted** your company for group benefits

**Do you currently have a benefits plan?**

**No**

* Is a benefits plan something you had ever thought about or something you would like to take a closer look at.

**If no plan:**

* Have you had one in the past?
* Is it something you have ever considered?
* Including yourself, how many full-time staff do you have?

* We have options for almost any situation & budget
* What would you be looking for in a benefits plan?
* Most employers share the cost 50/50 with their staff
* Benefits can be a tax-deduction for the company and a tax-free benefit to the employees
* Our most popular programs seem to appeal to clients looking for an affordable that’s easy to budget for
* We also offer couples rates which can include; married, common-law, same sex, or a single parent with 1 child.
* What makes our programs different is the things that normally affect your rates from year to year now no longer directly affect your rates as they are based on averages of the entire pool.
* claims, average age of the staff, how many people are on the plan etc

**Objective 1: Get email address**

For a quote you can:

* complete the last page of the attached pdf
* submit quote for processing

**Objective 2: Set appointment & send confirmation email**

* if I don’t hear back, when should I follow-up next?

**Yes**

* The reason I am calling is that we recently expanded our programs and now have options for almost any situation

**If have plan:**

* What do you like most about your current situation?
* If there was one thing you could change about your plan, what would that be?
* What type of benefits would be most important to you?
* Are there any ongoing claims or administration questions or concerns?
* When was the last time it was reviewed?
* Who is it with?
* How many staff do you have?
* Is it a younger staff, older staff or a good mix of ages?
* Our most popular programs seem to appeal to clients looking for an affordable that’s easy to budget for
* What makes our programs different is the things that normally affect your rates from year to year now no longer directly affect your rates as they are based on averages of the entire pool.
* claims, average age of the staff, how many people are on the plan etc
* **Our programs are different for a few reasons:**
  + You would work with us direct-to-client
  + Lower overhead
  + Stable rates
  + Couple rates etc
  + Most seem to be able to get better benefits for a similar premium.
  + Either way we are usually able help deliver better value.
* We also offer couples rates which can include; married, common-law, same sex, or a single parent with 1 child.

**Objective 1: Get email address**

For a quote you can:

* complete the last page of the attached pdf
* submit on-line

We can usually have a quote summary for you the next day

**Objective 2: Set appointment & send confirmation email**

* if I don’t hear back, when should I follow-up next?

**Objective 3:  When does it come up for renewal?**

* Ask to keep in touch, and send them something from time to time

**If not interested**

* Ask for email, send info package, put in automated follow-up system.