

Primerica

PROSPECTING GUIDE

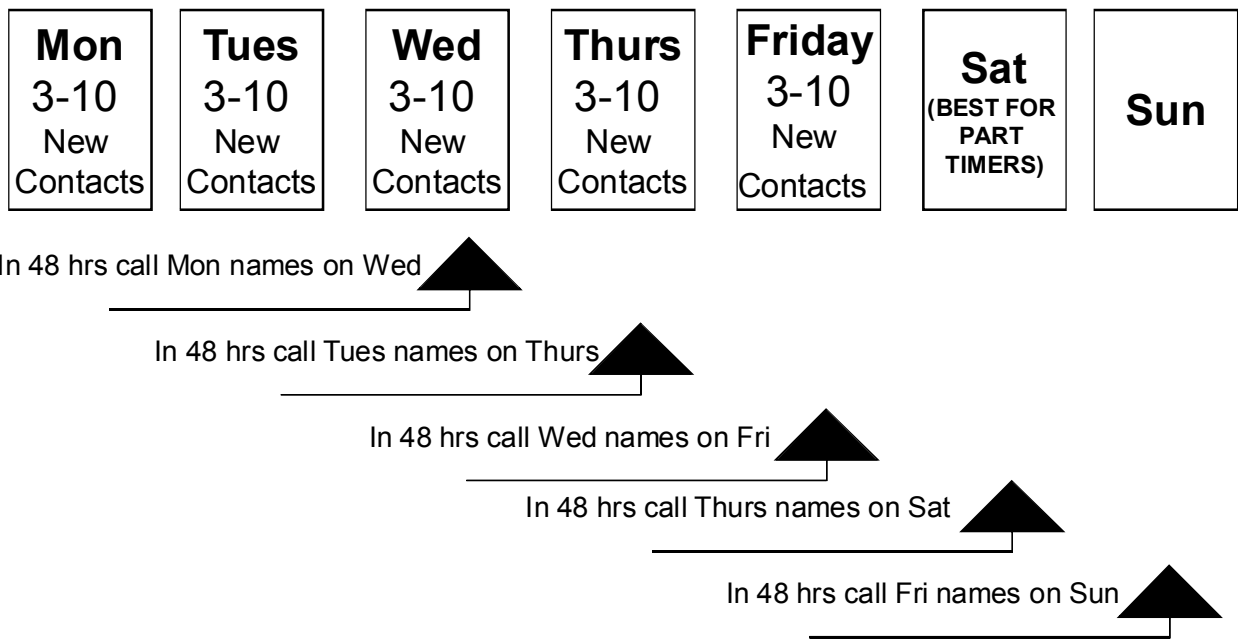
Scripts & Tips for Success

Multiple Sources



Vision 2010

Plan for Prospecting 9:00am to 12:00pm



- **Follow up, Follow up, Follow up!**
- **Repeat Steps Beginning of the Week**

**Another good plan is, 2 days of contacts,
one day of follow up calls...**

PROSPECTING SCRIPT

Face To Face

FIRST BREAK THE ICE START A CONVERSATION OR ASK FOR HELP (MAKE SMALL TALK)

- HOW LONG HAVE YOU WORKED HERE?
- HOW DO YOU LIKE IT?
- HOW LONG HAVE YOU LIVED IN THE AREA?
- WHAT DOES YOUR HUSBAND/WIFE DO?
- DO YOU HAVE KIDS?

ASK QUESTIONS = GOOD CONVERSATION

- “MY COMPANY IS EXPANDING, WE’RE TRAINING PEOPLE IN MANGEMENT.”
- DO YOU KEEP YOUR OPTIONS OPEN?
- DO YOU HAVE SOME TIME YOU COULD MAKE SOME MONEY ON THE SIDE

(SURE)

- GREAT, GIMMIE YOUR NAME AND NUMBER AND I’LL GET YOU SOME INFORMATION

(SURE) BUT WHAT DO YOU DO?

- “WE DEAL IN A BROAD RANGE OF FINANCIAL SERVICES, WE ARE THE MARKETING DIVISION FOR CITIGROUP, I DON’T HAVE A LOT OF TIME RIGHT NOW, BUT GIMMIE YOUR NAME AND NUMBER I’LL GET YOU SOME INFORMATION.”

(GET THEIR NAME AND NUMBER)

- GREAT, I’LL CALL YA IN THE NEXT FEW DAYS!”

• Successful Prospecting Scripts

The following approved scripts were developed by successful Field Leaders and need to be followed exactly as written. In this section you will see face to face scripts as well as telephone scripts.

Hot Market Face to Face

Scripts for A New Recruit

Script 1

Recruit: I have a friend who is expanding his business in the area. He/she is trying to locate some key people. I told him/her that if I ran across any sharp people that I would pass along their name and phone number.

I don't know if you'd be interested or even if you'd qualify, but I think you are the type of person that he/she is looking for (you're sharp, have credibility and people skills). He/she is conducting interviews right now and I'd suggest getting in touch with him/her. Let me jot down his/her name and number.

(Write down the name and number of trainer, tear the paper in half and hand both slips of paper with pen to the person and say:)

Why don't you jot down your name and number too, because he/she is extremely busy and hard to get a hold of.

(Then after receiving number say:)

What's the best time to reach you at this number? The next time I talk to him/her I'll pass along your name and number.

Prospect: What does he/she do? What is it all about?

Recruit : He/she is in the financial services business and teaches people how to make and save money, but it's best if you speak directly with him/her.

Successful Prospecting Scripts

Hot Market Face to Face

Scripts for a New Recruit with Limited Knowledge and Confidence

Script 2

Recruit: I'm in a sales management training program with a company that is looking to expand rapidly in the area. You seem like a very sharp person. Have you ever given any thought to doing something in addition to, or instead of, what you're already doing? **(WFA)**

I don't know if you'd be interested, or even if you'd qualify. However, I know the person conducting interviews. If I could get you an interview, would you be interested?

Hot Market Telephone

Script for Setting a Field Training Appointment

Script 3

Recruit: Hello _____, this is _____, how are things going?

(short conversation)

Are you and _____ (spouse) going to be home _____ night? Great, I was hoping you might be able to help me out. I'm starting to train part-time for a new career and I need to get some "on the job experience" with my trainer. It would really help me out if you would let us come on _____ night and show you what I will be doing. You would give me 60 minutes of your time, wouldn't you?

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Script 3 (continued)

Prospect: *What company is it? What do you do?*

Recruit: It's Primerica. We are in the financial services business. We basically teach people how to reduce their debt and rearrange their money so they can save money.

Don't worry. We won't try to sell you anything you don't want. We will just show you what we do, and if nothing else, it will help me get some good experience.

Will 6:00 p.m. or 8:00 p.m. work best for you?

Will that time definitely work for _____ (spouse) as well? It would be important that _____ (spouse) hear about this too. **(WFA)**

Now, since I'm just getting started with them, my credibility is really on the line, so can I definitely count on you both to be there when we come by on _____ night?

Great, we will see you on _____ night at _____ o'clock. Bye.

Note: *You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.*

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Hot Market Telephone

Script for Setting a Field Training Appointment with Best Friends or Close Family

Script 4

Recruit: Hello _____, **(chit chat)** Are you and _____ going to be home _____ night? Great! I have something to show you, and some body I want you to meet. Would _____ (time) or _____ (time) be best?

Prospect: What is it?

Recruit: I cannot explain it over the phone. I need to show you some information and I have someone I want you to meet... I have some time available on _____ (day). Or would _____ (day) be better. **(WFA)**

O.K. Would (time) or (time) work best?

Prospect: What is it about?

Recruit: I'm working for Primerica, a financial services company that's expanding in the area. I would like to show you what we do and see what you think. Grab your calendar. I have some time available on _____ or _____. Which would work best?(WFA)

O.K. So would (time) or (time) work best?

Do me a favor, let _____ (spouse) know and put it on your calendar so you don't forget. Okay, great! See you at _____.
Bye.

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Hot Market Telephone

Script for Setting a Field Training Appointment with Close Friends and Family

Script 5

Recruit: Hello _____. This is _____. How are things going?
(chit chat)

The reason I'm calling is I am starting a new second career and I have to get a license through the state. I have to go through some field training and I wanted to know if you and _____ (spouse) would help me out and sit through a presentation with me and a friend who is training me. **(WFA)**

Great! I am scheduled to work on _____ and _____. Which day would work better for you and _____ (spouse)? **(WFA)**

Great. What is a better time for you, 6:00 p.m. or 8:00 p.m.?

Prospect: What is it about?

Recruit: I'm working with Primerica. We would like to show you what we do and see what you think. I have some time available on _____ or _____. Which would work best?

(WFA)

GREAT! So would _____ (time) or _____ (time) work best? Do me a favor, let _____ (spouse) know and put it on your calendar so you don't forget.

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Hot Market Telephone

Script for Setting an Appointment with Close Friends and Family

Script 6

Recruit: Hello,_____. This is_____. Are you and_____ (spouse name) going to be home on Tuesday night? **(WFA)**

Prospect: *Yes, we will be home.*

Recruit: Great, I've got something I want to show you and someone I want you to meet. Is 6 o'clock good or is 7 o'clock better? **(WFA)**

Prospect: *No we won't be home Tuesday night.*

Recruit: Oh, are you going out? How's_____ then?

Prospect: *Sure, what is it?*

Recruit: I found a way to earn extra money and I want you to see what I'll be doing.

Prospect: *Give me more information.*

Recruit: The company provides solutions to people's financial problems. And everyone has financial problems today, don't they? **(WFA)**

They help families in many different ways — too many to get into right now. You'll get all the details on_____. Which do you prefer, 6:00 p.m. or 7:00p.m.?

Note: *You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.*

Successful Prospecting Scripts

Hot Market Telephone

Script for an Invitation to an Opportunity Meeting

Script 7

Recruit: Hello _____. This is _____. How are things going?
(short conversation)

What are you doing _____ night? Great, I've got something that I really want to talk to you about and somebody I want you to meet!

Prospect: What is it? What are you doing?

Recruit: I've started to train part-time with Primerica. They're giving me the opportunity to train to eventually run my own office.

Anyway, the reason I called, our Regional Vice President and some of the other managers are going to be here for an orientation to explain what the company is doing, so I recommended you to _____ (field trainer's name) and he/she said I could have you come with me.

This is something you definitely need to check out. I'll swing by and pick you and _____ (spouse) up at about 6:30 p.m. Fair enough?

Prospect: What company is it? What do you do?

Recruit: It's Primerica. We basically teach people how to reduce their debt and rearrange their money so they can save more money by doing a Financial Needs Analysis.

We will cover everything in detail on _____.

Successful Prospecting Scripts

Script 7 (continued)

Recruit: Don't worry, we won't try to sell you anything you don't want, and I promise you that you'll learn one or two things that could save you lots of money.

Now, since I'm just getting started with them, my credibility is really on the line, so can I definitely count on you both to be there on _____?

Note: *You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.*

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Hot Market Telephone

Script for an Invitation to an Opportunity Meeting for Close Friends and Family

Script 8

Recruit: Hello, _____. This is _____. Are you going to be free on _____ night? **(WFA)**

Prospect: Yes

Recruit: Great, I've got something I want to show you and someone I want you to meet, so dress sharp. I'll pick you up at 6:30 p.m. See you then. Bye.

(If Prospect has questions, continue)

Prospect: Sure, what is it?

Recruit: I found a way to earn extra income, and I want you to see what I'll be doing.

Prospect: Okay, what's the name of your company?

Recruit: Primerica.

Prospect: What kind of business?

Recruit: Financial services. We help people find solutions to their financial problems... That's great. I knew you'd help me. So I'll pick you up Tuesday at 6:30p.m. and we'll go over it then. Bye.

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

Successful Prospecting Scripts

Hot Market Telephone

Script for Setting an Appointment

Script 9

Recruit: Hi, _____. I've been selected by Primerica Financial Services and I am already in the training phase! I don't know if they mentioned it to you, but I have to observe at least six business presentations as part of my training process. I'm trying to get it accomplished this week.

Would you and (spouse) be willing to help me with my training on _____ (Day 1) or _____ (Day 2) evening? **(WFA)**

Would 6:00 p.m. or 8:00 p.m. work best? **(WFA)**

Thanks a lot. I'll be with my field trainer on _____ (day) at _____ p.m. I'm really excited about the career potential, and you'll get the opportunity to see what we do. Oh yeah, don't worry, he/she won't try to sell you anything you don't want, and I promise you that you'll learn one or two things that could save you a ton of money. I look forward to seeing you both then.

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Hot Market Telephone

Script for Re-Approaching a Close Friend or Family Member for the Opportunity Meeting

Script 10

Recruit: Hey, this is_____. If you knew of a way to make a lot of money, would you tell me about it?

Prospect: Sure!

Recruit: But suppose I resisted you, would you still tell me about it?

Prospect: Sure!

Recruit: Suppose I really fought you on it, but you knew I could do it and it would mean all the difference in the world for my family's future, would you still insist I look at it?

Prospect: Yes!

Recruit: That's what I'm thinking about with you. I've seen something that I know you would be great at. I'll pick you up Tuesday at 6:45 p.m. We'll go over it then. Bye!

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Hot Market Telephone

Script for Someone You Know Who Wants a Better Career/Life

Script 11

Recruit: Hi _____! This is _____. How's it going?
(Make brief small talk.)

Listen, I've come across a company that has an incredible opportunity for growth right now, and they are looking for some key people to expand their business. I thought of you right away and want to give you a chance to be considered by them.

What night is better for you for me to drop by? I've got _____
or _____ open right now.

What time is better 6 p.m. or 8 p.m.? _____ **(WFA)**

And _____ (spouse's name) will be there too, right? Great! See you then.

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Warm Market Telephone

Script for Setting an Appointment for an Opportunity Meeting

Script 12

Recruit: Hi _____. This is _____.
(Make brief small talk.)

I've run into a company and an opportunity that really has my interest. It's giving me a chance to achieve some things that have always been very important to me. Things like: *(Pick out a few of these below)*

- *Better provide for my family*
- *Be recognized for my accomplishments*
- *Work with positive, quality people*
- *Do something that really helps people*
- *Provide a better education for my children*
- *Do something special with my life*
- *Own my own business*
- *Become debt free*
- *Be independent*
- *Get a new home*
- *Really get ahead*
- *Call my own shots*

I would like to set a time for us to get together and share this information, and

I have some time on _____ or _____. Which day would be best for you?

Is _____ o'clock or _____ better? **(WFA)**

GREAT. We will see you then. *BY THE WAY*, the purpose of the presentation is simply to provide you with an introduction to Primerica. If you want to look into it further, I'll arrange for that.

I promise we will not try to sell you anything that you are not interested in. The worst thing that will happen is you may learn something valuable. Fair enough?

Successful Prospecting Scripts

Warm Market Telephone

Script for Setting an Appointment for an Opportunity Meeting

Script 13

Recruit: Hi, _____. This is _____. Are you doing anything _____ night? **(WFA)**

Great! I'm working for Primerica, and we're looking for talented people who might be interested in a career change if the money is right.

It's a great opportunity, and something I think you might be interested in. We're having an information seminar _____ night and I'd like you to attend.

As a matter of fact, you can ride with me. I'll pick you up around _____ p.m. Fair enough?

Note: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

For internal use only. Not to be used with, or distributed to the public.

Successful Prospecting Scripts

Warm Market Telephone

Script for Setting a Recruiting Appointment

Script 14

Recruit: Hi _____! This is _____! How's it going?
(Make brief small talk.)

I am going into business for myself in the financial services industry...have you heard? **(WFA)**

I'm with Primerica. I have the opportunity to eventually open my own office, and I am really excited about it. I want to get together with you guys and fill you in. When can we get together? I want to drop by one night this week.

Prospect: That's fine.

Recruit: What night is better for you guys _____
or _____? **(WFA)**

What time is better, 6 p.m. or 8 p.m.? **(WFA)**

Will _____ (spouses name) be there too, right? **(WFA)** Great!
See you both then!

Prospect: (Asks more questions)

Recruit: You know, these questions are great. Why don't we just get together and we can discuss this some more face to face. This is exactly what I need right now...people helping me find out how valuable this company really is.

You can ask all the questions you want when we get together.

PROSPECTING FOLLOW UP

CALLING BACK TO SET AN APPOINTMENT

Recruit: "HELLO _____, THIS IS _____. I MET YOU THE OTHER DAY AT _____. HOW ARE THINGS GOIN?"

ARE YOU KEEPING BUSY? (MAKE SMALL TALK)

" I WANT TO SEE HOW YOUR SCHEDULE IS, WHAT TIME DO YOU USUALLY GET HOME FROM WORK?"

(WFA)

"I WANTED TO DROP BY SOME INFORMATION TO YA, WHAT AREA OF TOWN DO YOU LIVE IN?"

(WFA)

"WHAT'S YOUR ADDRESS?"

(WFA)

"DOES YOU HUSBAND/WIFE WORK? IF I COULD I'D LIKE TO GET WITH BOTH OF YOU, BECAUSE IF YOU DECIDE TO COME TO WORK WITH US PART TIME OR CONSIDER A CAREER CHANGE, YOU'D WANT (HIM/HER) TO KNOW ABOUT IT WOULDN'T YOU?"

"I COULD STOP BY (MONDAY) OR WOULD (WEDNESDAY) BE BETTER?"

OKAY IS (6:00) GOOD OR (8:00) BETTER ?

"GREAT, COULD WRITE THAT DOWN IN YOUR CALENDAR SO YA DON'T FORGET, AND I LOOK FORWARD TO MEETING WITH YOU !"

More Tips

What is it?

In a nutshell what I'll do is help you and (spouse) develop a plan to accomplish any and all of your financial goals. We'll focus on areas you are already spending, maybe look for ways to drastically reduce your costs and redirect money to other areas in the budget to get more value for the money you're already spending.

So what I'd like to do is set a time to get together with you and (spouse) to share the same information I shared with (people who referred). Okay **(GO TO CLOSE)**.

You sense that they are trying to put you off / Have someone else / Don't have time

Listen, (referrals name), generally when someone tells me that, what I really find is that usually they are feeling like I'm going to come over and try to sell them something they don't want or need and that I'm going to waste their time, is that kind of how you are feeling?

Look (referrals name), (people who referred) trusted me enough to call you. Of course you know I work off of a referral basis and if I were to see you and waste your time or tried to get you involved in something you didn't want or need, is there any chance of you giving me any referrals?

You see, it's not in my best interest to do that. There is no doubt in my mind based on what we did for (people who referred) that this will be very positive, can save you money and cut your retirement years, but we won't know that unless we get together. So what I'd like to do is set up a time where we could meet for 20-30 minutes to show you what we do.

I know you're going to be very impressed and I promised (people who referred) that I would do that. I also promised them that I wouldn't do anything to lose or violate the trust they have in me.

So I want you to feel comfortable that I'm not going to waste your time and I'm not going to get you involved in something you don't want or need. And, unless I can substantially improve your situation, we are not going to do anything, fair enough? **(GO TO CLOSE)**