

SETTING THE APPOINTMENT

PHONE TIPS

Always start a phone time with a **SPECIFIC** goal for the number of appointments you want to achieve **YOUR** income goals.

The Phone Must Dos:

- Smile when you dial- people can tell the difference, KEY: look in a mirror when you call
- Always offer a choice of two times
- Know when you want to set the appointments before you start calling
- Be enthusiastic, it is **HOW** you say something
- Read back the directions to the customer
- Consistent phone effort = consistently bigger paychecks
- **Follow the Approach Word for Word: The Phone is Your ATM**

The Phone Must Not Do:

- Don't set up appointments more than 3 days in advance.
- Don't be afraid to ask for an immediate appointment.
- Don't sell over the phone. The objective is to get an appointment.

I. PERSONAL CONTACT APPROACH

We call this the HELP Approach:

Hello (name). This is _____. How are you? Hey, the reason I am calling is because I am in this really awesome college internship and...

- **HELP:** I could really use your **help**
- **EDUCATE:** As part of my training, I am **educating** 15 families/day on a service that helps them live worry-free from everyday life issues, including the #1 crime in America, ID theft.
- **LEARN:** You may or may not be interested, but you will love **learning** about it, it will only take about 15 minutes, and I promise the presentation will be of great value to you.
- **PEOPLE:** Plus, you may know some **people** would want it and that would really help me out.

By the way, you don't have to get anything, so you can relax. Our #1 goal is to educate consumers so they **KNOW** how to protect themselves. I need to do _____ appointments before _____, so I wanted to know if I could stop by on _____ at _____, or would _____ be better for you?

Thank you so much, (name)! This appointment is really important to me. Do you have a pen and paper? Could you please jot down that I will be there on _____ at _____? Thanks again, you are helping me hit my daily goal! (Get directions if needed.)

NEVER USE THIS APPROACH WITH YOUR REFERRALS!
THIS APPROACH IS ONLY TO BE USED WITH PEOPLE YOU KNOW FROM YOUR INITIAL LIST.

II. NEIGHBOR REFERRAL CONTACT APPROACH (to fill in gaps)

“Hi! Mrs. _____? (or “Hi, are you the mom”)? My name’s (first name). I’m the one who’s been sitting down with all the families here in (name neighborhood), educating people about how to live worry free from every day issues, including America’s #1 crime today, Identity theft. I was just talking with _____ and _____ and wanted to be sure to catch you for just a minute; they thought you’d really love to learn about what I showed them. “Let’s see...you have your own business and a couple of teenagers (share pre-approach info you gathered), right?” Great! I’m going to share with 15 families today, so I only have a couple minutes to explain it. Do you have a few minutes right now, I am just down the street, I promise I will be in an out and the presentation will be of great value to you, just like it was for the _____’s and the _____’s.”

They still don't know what is going on...

“I guess you haven’t heard about me yet? Like I said, my name is _____ and I am studying (your major) at (your college). I am doing an internship this summer, and as part of my training I have been educating families on a service many have been getting like the _____ and _____. If you like it, cool. If not, no big deal. All the families here in _____ have been really nice as long as I don’t take more than 15 minutes. Do you have a few minutes now while I am in the neighborhood?”

If the customer hesitates, say:

“You know what, I don’t even need to come in, I can just drop by and show you real quick on your porch.” I need to educate 15 families a day and giving you a quick presentation will really help me meet my goals for the day. Can you help me out?

You don't have to get anything, so you can relax. Our #1 goal is to educate consumers so they KNOW about the service. I need to do _____ appointments before _____, so I wanted to know if I could stop by on _____ at _____, or would _____ be better for you?

Thank you so much! This really helps me out! This appointment is really important to me. Do you have a pen and paper? Could you please jot down that I will be there on _____ at _____? Thanks again, this will help me hit my daily goal! (Get directions if needed.)

III. REFERRAL PHONE APPROACH

This approach works perfectly with people that you kind of know, but you may not feel comfortable calling with the other approach.

Role Play the approach

Hi _____ this is _____. How are you doing? I don't know if my name rings a bell, but I am (neighbor, child's friends, etc). They were excited about our service and thought you might benefit from taking a look too. I am working in a college internship program and as part of my training, I need to educate 15 families/day about how to live worry free from America's #1 crime

today, Identity theft. I'm pretty new so right now I'm practicing with people that I'm kind of acquainted with. Now, please understand that you don't have to buy, you just need to listen and give me feedback so I can get better. I really need the practice. It's a lot of fun and only takes about 15 minutes. It also helps me gain presentation experience which is great for my resume. I know you're really busy because it's _____, but I'm trying to hit my daily goals and in order to do that I need some more appointments for _____. So, if you could squeeze me in at _____ or would _____ be better for you-it would REALLY help me out!

POSSIBLES QUESTIONS

"What is the service?"

To be honest it would take me 45 minutes over the phone to tell you. I only get credit for personal presentation, and they only take about 15 minutes in person... would you help me out and give me 15 minutes tomorrow at _____ o'clock or would _____ o'clock be better?

"It's a service that helps customers live worry free by giving them access to over 5000 attorneys & Identity theft specialists, nationwide, for help with everything from the trivial to the traumatic for just pennies a day, have you ever heard of it before?"

"No": Most people haven't! With over 80% of people in Europe using it, that's why we dedicated to educating the families in America. So would _____ or _____ be better for you?"

"Yes": "That's great! Like I said, I am doing it for the training and I'd love to get your opinion. Plus, I get credit for just making the presentation anyway. So would _____ or _____ be better for you?"

"That time does not work" or "I'm really busy."

"OK, well I really need to do _____ appointments by _____, so how about at _____, or would _____ be better for you?"

"How long does it take?"

"Not too long at all, my part is about 15-20 minutes. After that it's up to you. So which time would be best for you, _____ o'clock or would _____ o'clock be better?"

"I'm not going to buy anything."

"That's okay because I get credit for the presentation even if you don't get something and I have a goal to make 15 per day. Can I count on you to help me out?So which time would be best for you, _____ o'clock or would _____ o'clock be better?"

MAKING THE PRESENTATION

1. Go to the door most often used
2. Knock 3 times
3. Step back two steps
4. Profile (stand sideways)
5. Smile
6. Talk slowly
7. Relax, lower voice
8. Pause in your approach only when indicated

Remember, throughout the presentation, there are 3 questions the customer is asking themselves about the service:

- 1) IS IT **SIMPLE**? 2) DOES IT **WORK**? 3) WOULD I **USE IT**?

Key Success Principle: Be yourself! Have fun! Lighten up and your sales will brighten up. Remember, you can't say the right thing to the wrong person and you can't say the wrong thing to the right person.

INTRODUCTION

ESTABLISH RAPPORT

Introduce Self Mr. and Mrs. _____, thank you for having me in your home.

For my college internship, I get to educate families on how to live worry-free. You may even know some of the families that have become members like the *(insert member's names)* and _____. *It's been a lot of fun so far.*

Warm Up It just takes a few minutes, so where is a good place to sit? The kitchen table would be great if that works for you. Find out about them:

Married? Single? Children? Where do you work? Homeowner or Renter?) Keep eye contact. LISTEN WELL, you may refer back to some things they say later.

Dream Page By the way, I'd like to show you my personal goals for this summer. Show Dream Page, explain goals. So, thank you for helping me reach my goals.

Live Worry Free *(Pull out the Consumer Folder)* Today I am going to show you about a service that is designed to help people live worry-free. It's been a life-saver to a lot of families. There are a couple of reasons everyone has been so excited about it.

BUILD INTEREST

3 Benefits (point to 3 bullets) First, they want to **protect** their family, Second, **save** money and time, Third, **enjoy** peace of mind. Are these the kind of things that are important to you too? How about for just pennies a day? (Listen)

BUYING ATMOSPHERE

Show You How it Works

Great! My job is to educate you because we find that over 90% of the people we've presented to, never knew there was such an affordable solution to life's everyday issues. I'll just go ahead and show you how it works and we'll see what you think. If you like it great, if not that's OK too. Whatever you decide is totally fine with me. The only favor I'd like to ask is that after my presentation, if you can see how our service would help you, would you consider it for yourself or your family? Does that sound fair? Thanks!

THE 4 QUESTIONS

Create the need

Mr. and Mrs.(Last name), let me start with a few questions:

Q #1: In a year's time, would you agree we make major decisions that affect our lives personally, professionally and financially in areas such as these? (point to the "Have you ever?" box, give them time to read them ALL) Do you relate to any of these everyday issues?

Would you agree that wrong decisions in any of these areas can COST you financially?

If you could talk with an attorney who SPECIALIZES in your area of need, before making these kind of decisions, could their advice help you? Of course, that is what everybody says...

As a member, (underline, needed legal advice for anything) you can talk to a top-rated attorney if you needed legal advice for anything. All you need to do is call and they will provide the advice you need, and that's for an unlimited # of issues too! Nice, huh?

Treated Unfairly?

And what about this, (underline, "Been treated unfairly" and "Been overbilled for services") and ask:

Q #2: (NAME), have you ever been treated unfairly or overbilled for services?

How did you feel about it? Repeat emotion and agree.

What did you do about it?

And if it's happened before, do you think it might happen again?

Why didn't you call your attorney to help you with the issue?
(Pause/Listen) Exactly...that is what everyone says, "At, an average of over \$200/hr, attorneys cost too much!"

Well, these are the kind of everyday life issues our service was designed for...so as a member, if you're treated unfairly, don't get mad or frustrated, simply pick up the phone and get the advice you need to feel empowered. They will even make a phone call or write a letter on your behalf, on an UNLIMITED number of issues, if that is what you need. Are you beginning to see why our customers worry less?

Signed Contract? Now here's another question, (*Underline, "Signed a contract"*) and ask:

Q #3: (Name) Have you ever signed a document or contract you?

Of course you have...Every time we buy or sell a house, rent an apartment, buy or lease a car, get a credit card, cell phone, join a club, we sign contracts, don't we?

Whenever someone asks a wealthy person to sign a contract, what do they do? (Let my attorney review it first)

Do you think the wealthy got wealthy because they had access to top legal minds? How would you like to have the same privilege the wealthy have?

So, the next time some says, "Sign here," Would you feel more protected if you had your attorney review the contract first? As a member, an attorney will review an unlimited number of documents and contracts for you, tell you your rights, and make recommendations to protect and save you money. Does that sound valuable?

Have a will? Speaking of saving money, let me show you how we can save you HUGE money on the front-end when you get the membership (*Underline, "Thought about writing or revising a will for your family"*)

Q #4: (NAME) When was the last time you updated your will?

If they don't have one say...You're not the only one- at least 7 out of 10 people don't have an updated will or a will at all!

You really care about your loved ones don't you? Do you think the state cares about your loved ones as much as you do?

Did you know that without a will, the State will have more "say so" than you in what happens to your assets that you've worked so hard for, and even what happens to your children? Your Will is your voice.

And here is where we save you BIG money, right away, instead of having to pay \$500-\$1500 to get a will, as a member, you get it FREE! You like free, don't you? (Show them the new member kit and the will questionnaire) You are provided a comprehensive will, power of attorney, and a medical directive the minute your application is processed.

Trial Close

(NAME), so if at any time or anywhere you had an issue on any matter, you would have access to over 2500 attorneys nationwide to give you the advice you need. *(Nod head)* Can you begin to see why so many families want a membership?

To summarize what we just discussed, OPEN FOLDER, as a member this service will give you...*(point to PREVENTIVE LAW)*

Preventative Law

1. **Unlimited phone consultation**, on an unlimited number of issues, for the life of your membership. You can call anytime for any reason to get advice.
2. **Phone calls and letters written on your behalf** if you're ever treated unfairly, unlimited in scope for the life of your membership.
3. **Unlimited Contract and document review for up to 10 pages each.**
4. And a **comprehensive will prepared with annual updates!**

Is there any reason, Mr/Mrs prospect, for \$1.19 day, you wouldn't want to get your family protected starting today?

ADDITIONAL LEGAL CARE

What is even more amazing is that so far we have ONLY discussed *(point to preventive law)* this one benefit, with our membership you get ALL of these others services too *(point to rest of the two pages)!* Let me quickly show you how the others services will help you!

Motor Vehicle

Point to the cop giving a ticket pic and say: You will also receive motor vehicle representation. In the event that you have any traffic tickets or need criminal representation, we have full coverage, **without the attorney fees**, as long as drugs or alcohol aren't involved. Let me show you how much just one traffic ticket will raise your insurance. *(Show the 20%,30% and over 50% COST INCREASES to insurance rates with 1, 2, and 3 tickets!)*

(NAME), you have ___ teenage drivers, how much do you think just this benefit alone could save you? Now, there is a 15-day wait on this area so you would have to play it cool for the next 2-weeks...laugh.

Trial Defense

Point to court room pic and say: This is where you get peace of mind. You would have trial defense services should anybody bring a civil suit or a job-related criminal charge against you. And *(name)*, even if someone sues you for NO valid reason, you still have to defend yourself and that

costs big money. In today's world, crazy lawsuits are happening every day, aren't they? (Then write: 75 - 1st year and say):

with our top selling plan, you'll have 75 total trial hours your first year and (write: 335 - 5th year and say): by your 5th year as a member, you'll have 335 total trial hours, (write: \$70,000 and say) that's about \$70,000 in trial defense costs! That is why our members keep the membership forever. And here's the good news...in 40 years, our member's rates have NEVER GONE UP. (Name), does your car, health, or home insurance offer you **more** coverage, at the same rate, 5 years later? NO! Nobody does that.

IRS Audit

You would also receive IRS Audit representation. If the IRS audits you, a tax attorney will represent you. Would you worry less knowing a tax attorney would protect your rights if you had an IRS audit? Of course! This is the kind of protection that lets you sleep at night, wouldn't you agree?

25% Discount

Now, the service doesn't cover everything, so for major needs like divorce, bankruptcy, or foreclosure, you'll also have the special Preferred Member discount of at least 25% off your law firm's hourly rate, this even covers pre-existing conditions!

24/7 Access

Then to top it all off, you will have a special number to call 24 hours, (Show your card) 7 days/week in case you are detained. It's called the Legal Shield. Not even the rich have that kind of access. Nice benefit, isn't it?

Check interest

(NAME), look pretty cool? What benefits would you use the most, calling for advice so you're not mistreated or maybe getting your will update OR done for FREE (state benefits that would most fit customer)?

IDENTITY THEFT SHIELD

ID Theft

Now, the second part of the membership helps you and your husband protect your good name and keep your identity secure with the most comprehensive ID theft coverage in the world. Did you know that someone's identity is stolen every 3 seconds? Identity theft is the fastest growing white collar crime. Did you know, that without our membership, the average person spends over 600 hours and between \$1,500 - \$15,000 to restore their identity on their own? If your identity was stolen, would you know what to do?

Let me show you the two BIG reasons, we are everyone's #1 choice.

1st reason

The first reason is, we stand alone as the ONLY company that covers you from ALL 5 types of IDT. (point to all 5 coverage's at top of IDT page) then point to the bottom detailed section with the bullets and say), you

can see here what the thieves are doing with you information. Scary, huh?

Let me give you some perspective on how this would affect you personally. REPEAT WITH EACH BELOW:
(Name), you may think you are in your (kitchen, living room, etc) with me right now, but...

1. You are really working construction in New Mexico. You don't know there is another YOU until the IRS sends you the bill for unpaid taxes
2. You are really getting a cell phone in Texas. You won't know about this until you go for a loan and your credit has been ruined.
3. You are really having a baby right now in Miami. You don't know this is happening until the bill collectors start calling! True story. A woman with 4 kids got all the bills for a baby she never had in a state she'd never been.
4. You are really selling drugs in New York. You don't know about this until the next time you are pulled over for a routine traffic ticket, they look up your name, and there is a warrant for your arrest in NY. So you are booked and taken to jail for drug trafficking.

These are true stories that are happening every day. Who would you call when these things happen? Your visa card, bank or life-lock. They don't have a network of 2500 attorneys ready to protect you! Is protecting your good name important to you? Of course, that's what everyone says!

2nd reason

The 2nd Reason we are the #1 Identity theft protection is:
While all IDT services give you 1-3, we stand alone as the only company that provides (*read #4*) IDT consultation and complete restoration should you become a victim from ANY of the 5 areas.
(*Then close with statement in red and say*)
"Our IDT and LEGAL services **together** provide you and your spouse with the most comprehensive service available today, covering ALL 5 areas of IDT."

Validate

Even the Institute of Fraud Risk Management *states that* "A **true restoration service will generally offer consumers ...access to legal counsel...**" Makes sense, doesn't it?

SUMMARY

So, (NAME), this is how all of the services work together to give you the BEST protection possible if your identity was compromised. You would have access to over 2,200 Licensed Fraud investigators working behind the scenes to restore your identity and prove you are who you say you are (point to IDT page), while top rated attorney's would be working with you on all the other issues like creditors, IRS bills, even jail time (point to Legal page). Can you see how this would save you time, money and give peace of mind?

(Sweep hand over both IDT page and Legal page) Think about it, how much does all of this weigh on your sense of freedom and peace of mind?

PRICE BUILD UP

Legal Care

Anyway, by now I guess you're wondering about the cost. I think that's the main reason you'll want it. If you were both an attorney and licensed investigator, what would you charge per month if a person could talk to you about anything, at anytime and receive from you all the services you see here, plus you'd completely restore their identity should they become a victim of IDT? Before you give me an answer, let's write down what the average American would pay for each service without our membership.

ACTION: Write out the typical hr/cost for each area under preventative and the other areas of coverage that typical attorney's charges:

Unlimited telephone consultations **\$200/hr for every issue**
Unlimited Contract Review **\$200+ every contract**
Will: **\$500-1500, + \$200** yearly update
Motor Vehicle: **\$200-400** locally and **\$500+** out of state to go to court for you
Trial Defense: **\$200-400/hr**
IRS audit representation: **up to \$1000+** and more to represent
24/7 access: **\$200/hr**
IDT: **Avg cost \$1,500-15,000**

Okay, so what would you charge monthly for all of this? (Let them give you a price) Exactly, most people think \$500, \$1000 and upwards of \$2000/mo. But, the biggest reason everyone's been getting the membership, which covers all these areas,.... is that the cost is only \$35.95/mo, and look who it covers (read bottom of legal care page). That's so amazing, isn't it?

Validate

What's really cool is you have unlimited access to attorney's throughout all of North America and there are no contracts so you can cancel at any time, but like the Jones' said, they spend \$35 going out dinner after ball practice, and if it's something that saves the family time, money and gives them peace of mind – they're all for it!

Turn to back page of CF...Highlight testimonials that apply to them

Names

After reading testimonials, say...Is the membership starting to make sense to you? You probably know some of the families who are already members. *(At this point, you can read names from your "I'm making a difference" page in 3 ring binder)*

THE CLOSING STEPS

- Way I do business** “(Name), here is what everybody likes about the way I do business. I’m signing up members today and I’ll be overnighting the orders this (state day of wk your office overnights). (*pull out an application while you are saying this*). That way your family gets protected right away. Getting the membership would make life easier, wouldn’t it?”
- Local Agent** “Another thing people like about the way we do business is that you’ll have access to a PSI Agent locally, (*show label on back of CF and introduce the PSI agent you are working with*). That way if you have any questions on how to maximize the benefits, simply call the number here. Are you with me?”
- Emails** “We will also be sending you emails for the next two months, reminding you of all the benefits, so you don’t forget to use them all, everyday if you need to. Sound good? And what is the best email address to reach you? How about your spouse?” (get BOTH for the Marketing and Retention system) put on the QPR.
- Close** (Name), if you get started today, you also get our FREE Will Kit. If I am reading you right, I’d say you’re ready to start saving money and get protected, yes? (wait for commitment), if no, go to overcoming objections or drop down.
- Application** “Great, the only other things I need in order to begin your protection are your mailing address, birthday, phone #, and bank information. What is your best phone number? I will also need a voided check to send with your application. Oh, and can you fill out your social security # right here?” Turn app and give to member.
- Signature** “Cool, let me just read that back to you (read back soc#, address, birthday, spouses name, phone #'s and email). Let me just get your ‘okay’ right here.”
- What's next** Give them the "Maximizing Your Membership" and give them the will kit and New member CD
- Referrals** Ask for the referrals exactly as we teach, THEN pull out your referral form