

INVITING GUESTS – HOT MARKET (Family & Friends)

Helpful Hints

- Your job is to “invite”. Do not try to explain the business. Let us explain it.
- Giving information **will not** get people to the meeting. It will only lead to more questions.
- **Never** use the words, insurance, mortgages or investments. **It is illegal** to talk about financial products until you are licensed to market them.
- Don’t speak formally to your friends, be natural, like you’re inviting them out.
- Once they commit to come, **get off the phone** so they don’t overwhelm you with questions.
- **Pick them up.** This is the most effective way to get them to the meeting.
- **Don’t reinvent the wheel.** Practice these scripts several times before calling.

INVITE SCRIPT

Hi _____, this is _____ (short chat). Are you going to be free on _____ evening? (WFA)

“YES”

Go to Closing Statement

“NO”

What do you have planned for next _____? Go to Closing Statement

CLOSING STATEMENT

“I need a big favor. I’m getting started part-time with a company called Primerica. The company is expanding in the area. I think it’s something you’ll be interested in, but even if you’re not would you come to a Business Briefing with me on _____ night, so you can give me your opinion. I’d really appreciate your support. Can you do me that favor?”

CHORUS

“Yes”

Great, I’ll pick you up at _____ (time).

OR

Let me give you the directions to the meeting place.

FINAL TIE DOWN

The meeting starts promptly at _____ so will you need to be there no later than. _____ (time). By the way you need to wear business casual attire because I’m going to introduce you to my Vice President. I look forward to seeing you. I know you will be impressed.

AREAS OF CONCERN

What is it all about? /What do you do?

The company helps people get of debt and save more money. I’m just getting started, and I don’t have all the information yet. My Vice President will give you all the details when you come. Can I count on you to help me? (CHORUS)

I’m Really Busy

Hey so am I – if you called me I’d make time for you, I only need an hour and a half of your time. I really value your opinion. Could you do me that favor and come with me? (CHORUS)

Is This A Pyramid

Actually, Primerica has been in business since 1977. Do you think that I would be involved in something that wasn’t legitimate? Will you come out and get all the information before making a decision? (CHORUS)

Confirmation Call The Night Before The Meeting

I’m just calling to remind you of the Business Briefing on tomorrow @ _____ pm. I know that you will be impressed with the information. See you then.

INVITING GUESTS – COOL MARKET

(Neighbors , Co-workers, Church etc)

Hello, _____, the reason I am calling is I got involved with Primerica. It is a financial education company and they are going through major expansion in the area and are opening new offices. They are looking for some good people. I thought it might be something you would like to take a look at. I'd like to invite you to a Business Briefing so you can get all the details. We have Briefings on (day)_____ @ (time) & (day)_____ @ (time).

Which day will work best for you? Great (go to Chorus)

CHORUS

We can ride together. I'll pick you up at _____ p.m. so we can get there on time.

OR

Let me give you the directions to the meeting place.

AREAS OF CONCERN

Is it sales?

Actually, we are not traditional sales. We educate the under-served middle income consumer. I know you will be impressed with the information that we share, so ...

Chorus

Is it commissions?

Do you like commissions? (Yes or no)

Great, I know you'll be excited to hear about the four ways we earn income: fee for service, profit sharing compensation, residual income and bonuses. ***Chorus***

I'm too busy

Most people are really busy and I understand that feeling. I felt the same way, because I don't like my time wasted. But I found out that the hour I invested showed me how to drastically increase my financial security. If you could invest an hour and have the same thing happen to you, wouldn't it be worth it? ***Chorus***

What's going to happen at the meeting?

The Briefing will last about an hour and 15 minutes and will give you the information about our company, the concepts and the Business opportunity. Be sure to bring a notepad and pen to jot down any questions that you may have that don't get addressed during the meeting. We will meet briefly afterwards to get them answered. Will you be coming alone or bringing a spouse or friend...

Confirmation Call the Day Before the Meeting

I'm just calling to let you know that I'm really looking forward to seeing you tomorrow. I told my Vice President all about you and he/she is excited about meeting you. I know that you will be impressed. I'll see you tomorrow at _____ (time)... Do you need the directions again

INVITING GUESTS – FROM KT APPT

Read FNA Commitment

If your FNA identifies a shortfall between your current income and your family's goals and dreams, is there any reason why you wouldn't consider the Primerica business opportunity? (WFA)

CHORUS

We have Business briefings on _____(day) @ (time) and _____(day) @ (time). Which day would be better for you?

We can ride together. I'll pick you up at _____p.m. so we can get there on time.

OR

Let me give you the directions to the meeting place.

AREAS OF CONCERN

*Well, I'm not sure I want to do the business
I just want the financial plan.
I don't have the time to come.*

RESPONSE

Think about this, I am going to spend 2-3 hours working on your FNA. I am committed to helping you become debt-free and financially secure. Doesn't it make sense to invest an hour to find out more about the company that you are entrusting with your financial future? **Chorus**

Confirmation Call the Night Before

I'm just calling to let you know that I'm really looking forward to seeing you tomorrow. I told my Vice President all about you and he/she is excited about meeting you. I know that you will be impressed. I'll see you tomorrow at _____ (time)... Do you need the directions again?

INVITING GUESTS- SINGLE/NO KIDS REFERRALS

Hello, _____ this is _____ from Primerica. You were referred to me by _____. Do you have a few minutes to talk? He/She said that you are honest, hardworking and always looking to make extra income, is that true? Then this might hold some interest for you. We are a financial education company, and we are expanding in the area. We are looking for some people who may be interested in a part-time business opportunity with potential for a career change. We show people how to make and save money and get ahead financially. We are not looking for someone with experience because we fully train you. Does this sound like something that would hold your interest? (WFA)

YES,

My Vice President does a Business Briefing on ____ day/time and ____ day/time.

CHORUS, Which day works best for you? Great, let me give you the directions to the office.

NO,

Who do know who is looking for additional income or a career change?

AREAS OF CONCERN

Is it sales?

Actually, we are not traditional sales. We educate the under-served middle income consumer on making and saving money and eliminating debt... **Chorus**

Is it commissions?

Do you like commissions? (Yes or No)

Great, I know you'll be excited to hear about the four ways we earn income: fee for service, profit sharing compensation, residual income and bonuses. **Chorus**

I'm too busy

Most people are really busy and I understand that feeling. I felt the same way, because I don't like my time wasted. But I found out that the hour I invested showed me how to drastically increase my financial security. If you could invest an hour and have the same thing happen to you, wouldn't it be worth it? **Chorus**

What's going to happen at the meeting?

The Briefing will last about an hour and 15 minutes and will give you the information about our company, the concepts and the Business opportunity. Be sure to bring a notepad and pen to jot down any questions that you may have that don't get addressed during the meeting. We will meet briefly afterwards to get them answered. Will you be coming alone or bringing a spouse or friend...

Confirmation Call the Night Before

I'm just calling to let you know that I'm really looking forward to seeing you tomorrow. I told my Vice President all about you and he/she is excited about meeting you. I know that you will be impressed. I'll see you tomorrow at _____ (time)... Do you need the directions again?

APPOINTMENT SETTING- HOT MARKET

Hello _____ this is _____.

Hey, the reason I am calling is I need your help!
I am starting to work with a new company and I am going to school to get a license.

I need to view a presentation in the field with my trainer. It probably will not interest you... I just need your help! It takes about a ½ hour. I need both you and your (wife or husband) [use name if you know it] to be there.

CHORUS

I'm working with my trainer on ___ day and ___ day of this week. Which is better?
Shall we come over at ___ pm or is ___ pm better? Thanks I'll see you on ___ day at ___ (time).

AREAS OF CONCERN

What is it? (What do you do?)

“We show families how to make money, save money and get ahead financially. It probably won't interest you. I just need help with my training.” *Chorus*

What's the name of the company?

Primerica Financial Service, you've heard of us haven't you?

If Yes

Great! You can really help me out then, are you a client? *Yes or No*

Well, there's been some significant changes in the company, so when I come over I'll show you all the updates. *Chorus*

If No

Well we don't do a lot of advertising, but that's why I want to get together with you and show you everything. *Chorus*

I have to talk to my wife/husband. Can I call you back?

That's fine _____. I'll tell you what, if you could meet with me, which of those evenings do you think would be best? *Oh probably ___ day*

6:00pm or 8:00pm? *Probably ___ pm*

Well why don't we do this? Why don't we tentatively plan for ___ day @ ___ time and if there is a problem, give me a call back as soon as you can, and we'll reschedule it. Sound good? *Yes.* Great, I'll see you on ___ (day) at ___ (pm).

AREAS OF CONCERN CONTINUED...

For Training Purposes

AREAS OF CONCERN

CHORUS

I'm working with my trainer on ___ day and ___ day of this week. Which is better? Shall we come over at ___ pm or is ___ pm better? Thanks I'll see you on ___ day at ___ (time).

I'm too busy. I don't have the time.

Listen, I really understand that _____. Most people are really busy. And usually when somebody says they are really busy, what they're really saying is that they don't think it's going to be worthwhile or beneficial. And I understand that feeling. But what I'm going to show you is going to be really exciting and can make a tremendous difference in your financial future. Probably only take 30-35 minutes so... **Chorus**

Is this Insurance?

We are a diversified financial services company, do you need insurance? *Yes or No*
Great! Then you're really going to be excited about what I have to share. You see most financial services companies really over-charge for their services, either it is through credit cards, home loans, or insurance. My presentation and reading material shows you how to save a tremendous amount of money in many areas where you are currently spending... **Chorus**

Is this Amway? Multi-level Marketing? A Pyramid?

_____, do you like (Amway, Multi-level, Pyramids)?

If No.

Great! Then you'll love our company. We're really nothing like them. You see, we're in a highly regulated industry and must be licensed to market our products. I think you're going to find our company quite unique. So let's get together... **Chorus**

If Yes

Great! Then you'll love our company. We have some things in common, but as you'll see we're really quite unique... **Chorus**

I'm really not interested in buying anything.

Oh, I know _____ that's the last thing I'll ask you to do. At this point I only need your opinion. If you see something that can benefit you and you'd like to take advantage, that's fine. We can take care of that later. I just need your help in making a big decision. You'll help me out won't you? **Chorus**

I've already spoken to one of your Representatives.

Great! You can really help me out then, are you client? *Yes or No*
Well there's been some significant changes in the company so when I come over, I'll show you all of the updates and get your opinion... **Chorus**

APPOINTMENT SETTING – INDEPENDENT REPS - WARM MARKET

Hello _____ this is _____.

Hey, the reason I am calling is I need your help!

I am starting to work with a new company and I am going to school to get a license.

I just need you to hear my presentation and give me your opinion. It probably will not interest you... I just need your help! If you like the information, then you can give me some referrals. My presentation will take about a ½ hour. I need both you and your (wife or husband)
[use name if you know it] to be there.

CHORUS

I'm available on ___ day and ___ day of this week. Which is better?

Can I come over at ___pm (time) or is ___pm (time) better?

Thanks, I'll see you on ___ day at ___pm. (time)

AREAS OF CONCERN

What is it? (What do you do?)

"We show families how to make money, save money and get ahead financially. It probably won't interest you. I just need help with my training." **Chorus**

What's the name of the company?

Primerica Financial Service, you've heard of us haven't you?

If *Yes*

Great! You can really help me out then, are you a client? *Yes or No*

Well, there's been some significant changes in the company so when I come over I'll show you all the updates. **Chorus**

If *No*

Well we don't do a lot of advertising, but that's why I want to get together with you and show you everything. **Chorus**

I have to talk to my wife/husband. Can I call you back?

That's fine _____. I'll tell you what, if you could meet with me, which of those evenings do you think would be best? *Oh probably ___(day)*

6:00pm or 8:00pm? *Probably ___(time)*

Well why don't we do this? Why don't we tentatively plan for ___(day) @ ___(time) and if there is a problem, give me a call back as soon as you can, and we'll reschedule it. Sound good? *Yes*. Great, I'll see you on ___(day) at ___(time).

AREAS OF CONCERN CONTINUED

CHORUS

I'm working with my trainer on ___ day and ___ day of this week. Which is better? Shall we come over at 6:00 pm or is 8:00 pm better? Thanks I'll see you on ___ day at ___ (time).

I'm too busy. I don't have the time.

Listen, I really understand that _____. Most people are really busy. And usually when somebody says they are really busy, what they're really saying is that they don't think it's going to be worthwhile or beneficial. And I understand that feeling. But what I'm going to show you is going to be really exciting and it make a tremendous difference in your financial future. Probably only take 30-35 minutes so... **Chorus**

Is this Insurance?

We are a diversified financial services company, do you need insurance? *Yes or No*
Great! Then you're really going to be excited about what I have to share. You see most financial services companies really over-charge for their services, either it is through credit cards, home loans, or insurance. My presentation and reading material shows you how to save a tremendous amount of money in many areas where you are currently spending... **Chorus**

Is this Amway? Multi-level Marketing? A Pyramid?

_____, do you like (Amway, Multi-level, Pyramids)?

If No.

Great! then you'll love our company. We're really nothing like them. You see, we're in a highly regulated industry and must be licensed to market our products. I think you're going to find our company quite unique. So let's get together...**Chorus**

If Yes

Great! Then you'll love our company. We have some things in common, but as you'll see we're really quite unique...**Chorus**

I'm really not interested in buying anything.

Oh, I know _____ that's the last thing I'll ask you to do. At this point I only need your opinion. If you see something that can benefit you and you'd like to take advantage, that's fine. We can take care of that later. I just need your help in making a big decision. You'll help me out won't you? **Chorus**

I've already spoken to one of your Representatives.

Great! You can really help me out then, are you client? *Yes or No*
Well there's been some significant changes in the company so when I come over, I'll show you all of the updates and get your opinion...**Chorus**

KT APPOINTMENT SETTING – REFERRAL MARKET

Hello may I speak with _____ this is _____.

_____ (Referrer) gave me your name and phone # and asked me to give you a call. Do you have a few minutes?

I work with Primerica and I met with (Referrer) _____ for a few minutes the other day and shared some ideas on making and saving money and getting ahead financially. (Referrer) _____ said that you might not be interested, but you have a lot of credibility and could refer me to some great people once you knew what I was looking for. I'm calling to set a time that we can meet so I can share the information with you (and your spouse). We will only be about 30-45 minutes.

CHORUS

I have some time available for next ___ day or ___ day. Which day would be better for you? Would ___ pm (time) be good or ___ pm (time) be better?

AREAS OF CONCERN

What is it?

We show people how make money, save money & eliminate debt. Which of those interests you the most? Great, then that is what we discuss when we get together. **Chorus**

What's the name of the company?

Primerica, you've heard of us haven't you?

If *Yes*

Great! You can really help me out then, are you a client? *Yes or No*

Well, there's been some significant changes in the company so when I come over I'll show you all the updates. **Chorus**

If *No*

Well we don't do a lot of advertising, but that's why I want to get together with you and show you everything. **Chorus**

I have to talk to my wife/husband. Can I call you back?

That's fine _____. I'll tell you what, if you could meet with me, which of those evenings do you think would be best? *Oh probably ___ (day)*

6:00pm or 8:00pm? *Probably ___ (time)*

Well why don't we do this? Why don't we tentatively plan for ___ (day) @ ___ (time) and if there is a problem, give me a call back as soon as you can, and we'll reschedule it. Sound good? *Yes.* Great, I'll see you on ___ (day) at ___ (time).

AREAS OF CONCERN CONTINUED...

For Training Purposes Only

I'm too busy. I don't have the time.

Listen, I really understand that _____. Most people are really busy. And usually when somebody says they are really busy, what they're really saying is that they don't think it's going to be worthwhile or beneficial. And I understand that feeling. But what I'm going to show you is going to be really exciting and can make a tremendous difference in your financial future. Probably only take 30-35 minutes so... **Chorus**

Is this Insurance?

We are a diversified financial services company, do you need insurance? *Yes or No*
Great! Then you're really going to be excited about what I have to share. You see most financial services companies really over-charge for their services, either it is through credit cards, home loans, or insurance. My presentation and reading material shows you how to save a tremendous amount of money in many areas where you are currently spending... **Chorus**

Is this Amway? Multi-level Marketing? A Pyramid?

_____, do you like (Amway, Multi-level, Pyramids)?

If No.

Great! Then you'll love our company. We're really nothing like them. You see, we're in a highly regulated industry and must be licensed to market our products. I think you're going to find our company quite unique. So let's get together...**Chorus**

If Yes

Great! Then you'll love our company. We have some things in common, but as you'll see we're really quite unique...**Chorus**

I'm really not interested in buying anything.

Oh, I know _____ that's the last thing I'll ask you to do. At this point I only need your opinion. If you see something that can benefit you and you'd like to take advantage, that's fine. We can take care of that later. I just need your help in making a big decision. You'll help me out won't you? **Chorus**

I've already spoken to one of your Representatives.

Great! You can really help me out then, are you client? *Yes or No*
Well there's been some significant changes in the company so when I come over, I'll show you all of the updates and get your opinion...**Chorus**

CALLING PROSPECTS FROM FACE TO FACE

Hello, may I speak to _____? This is _____ (your name). Do you Remember we met at _____? Do you have a few minutes to talk? (WFA)
I was calling to give you some details about the part-time business opportunity. Primerica is a financial education company. We specialize in helping people become properly protected, debt free and financially independent. We are looking for motivated, ambitious people who are interested in a part-time business opportunity with the potential for a career change. Does that sound like you?

Great, let schedule a time to get together for about 30 minutes so we can see if there is a mutual interest.

Set the Recruiting Interview date and time.

Cold Call Scripts

Leave Message on Voicemail

Good _____ this is _____ with Primerica. I'm expanding my business, and right now I'm looking to recruit and develop some people for our expansion. I'm now looking to fill some part-time and full-time positions and I'm looking for people who keep their eyes open for other opportunities to earn money.

If you keep your options open for income sources, please give me a call @_____. My phone # is _____ and ask for _____.

Please enjoy your day!

If they answer the phone,

Hello, may I speak to _____? My name is _____ I work with Primerica. Are you familiar with our company? Well, We are a financial education company and we are expanding in the area. We are looking for motivated, ambitious people who are interested in a part-time business opportunity with the potential for a career change. Does that sound like you?

Let me tell you a little more. We specialize in helping families become properly protected, debt free & financially independent. I am not looking for anyone with experience, because we train. But I am looking for people that keep their options open to earn extra income. Does that sound like something that might interest you? Great, let schedule a time to get together at my office for about 30 minutes....

If Yes: Schedule for a Recruiting Interview. Get their name, phone numbers & email address. Send directions via email. Confirm the appt the day before

If No: Do you know anyone who is interested in earning \$500-\$1,500 per month working 8-10 hours a week?

If they say tell me more..

We specialize in insurance, mortgages & investments. When we meet I will give all the information about who we are, what we do and the opportunity to make more money.

For Training Purposes Only

Cold Call Scripts Continued.....
When they call back

Thank you for returning my call. Are you familiar with our company?

If Yes, find out what they know

If No. We are a financial education company and we specialize in helping families become properly protected, debt free and financially independent.

Currently I am not looking for anyone who has any expertise in financial services. I am looking for motivated, ambitious people who likes to help other people and someone who keeps their options open for earning extra income. Does that sound like you?

Great, I'd love to schedule a time to meet with you for about 30 minutes to share the details...

If they say, tell me more...

We specialize in insurance, mortgages & investments. When we meet I will give all the information about who we are, what we do and the opportunity to make more money.

If they are not interested: Do you know anyone who is interested in earning \$500-\$1,500 per month working 8-10 hours a week?

Confirm date & time, get their ph #'s, and email address to send them the directions to the office. Call the day before to confirm the appt.

Send them an email, with the directions and the websites

www.primericabusinessopportunity.com

www.primercaalc.com

www.womeninprimerica.com

For Training Purposes Only