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| Follow-up call script: Term and CII special offer | |
| **Opening and introduction** | |
| **Get Client on phone** | Good morning/afternoon, may I speak with <Client Name>? |
| **Introduction and small talk** | Hello <Client Name>, my name is (Assistant Name/Advisor name) and I’m calling from (Advisors Names office at). How are you doing today? |
| **Opening and question** | I'm calling to follow up on an email I/we sent you recently about protecting yourself and loved ones with critical illness and life insurance. Did you have a chance to read the email? |
| **If yes** | Great! What were your initial thoughts? Did you have any questions about the coverage options or the special discount Sun Life is offering? |
| **If no** | No problem at all. I completely understand how busy life can get. Would you like me to briefly summarize the key points?   * If yes, move to **Offer details.** * If no, move to next **If no section** below. |
| **Offer details** | The main idea is that by combining critical illness and life insurance, we can create a comprehensive protection plan for you and your loved ones that provides you with peace of mind. And right now, Sun Life has a special offer running until December 31 with a 5% discount on the critical illness insurance premiums for the life of the policy. This offer could mean significant savings for you over time! Certain terms and conditions apply; your advisor can walk you through that. |
| **Move to book a meeting** | |
| **Ask to book a meeting** | I'd like to schedule a meeting to discuss how we can create a plan to address your needs – and take advantage of this limited time offer. Would you be interested in setting up a time to chat more about this?  I/Advisor name have/has some availability <this/next week> if that works for you (and partner/spouse name). |
| **If yes** | Great! Would you prefer this week or next week? And do you prefer morning, afternoon, or evenings? |
| **If no** | No problem. I hear you.Would you like me to follow up with you at another time about this offer, or anything else you may need help with? |
| **If yes:** Sure, that’s no problem. I’ve noted this in our system. We’ll be in touch again soon. Thank you for your time today, [Client name]. Have a nice day. |
| **If no:** No problem at all. Thank you for your time, [Client name]. Have a nice day. |
| **Once booked, confirm Client details** | |
| **Client details confirmation** | I will also send you an email with our contact information and details outlining the meeting. Can you please confirm your email address by spelling it for me? |
| **Call close (with confirmed appointment)** | |
| **Confirm meeting booking and thank Client** | Perfect! You’re booked with (Advisor Name) on (Date/Time).  I’m so glad we had the chance to connect today. If you have any questions, please give me/us a call at <insert phone> or send an email to <advisor email>. Thank you for taking the time to speak with me. Have a great day. |