**The Ultimate Appointment Tie Down!**

**Now is that going to be best to do with you (and your spouse) in the morning, afternoon, or evening?**

**When you say morning/afternoon do you mean (1:00 or more like 3:00)**

**If they say evening: What time do you guys usually get home from work and settled in?**

**(5:30 or more like 7:30)**

**Slow way down here:**

**Let me see here. I’m looking at my schedule... Long pause. Give me just a second.**

**Wow I’m going a little bit crazy over here there’s over a hundred of these forms on my desk, and I've got to get through all of them between now and the next week.**

**Okay, I do not have 5 pm tomorrow, but I could squeeze you in tomorrow at \_\_\_\_\_ or \_\_\_\_\_ . Which would be better \_\_\_\_\_ or \_\_\_\_\_ for you (and spouse together)? OK …….. Perfect!**

**It’s one of my very last spots, but I could squeeze you in tomorrow at 5:30 pm.**

**Are you 100% positive it will work for you/ the both of you together?**

**OK great! Cause if I do have a missed appointment….It takes away from me being able to help another family during that time slot…….**

**Perfect what I do next is Email you Hi From Dave…See you @1PM Tomorrow…. That way you will have my Credentials… What’s the best email for you?**

**Excellent, do you have an iPhone or Android?**

**Awesome. I’m also going to txt you…. Okay, cool so when you get my contact info, you can add me in your phone. That way when I call you, I’m not a stranger.**

**On the bottom of the email and the TXT there is a Logo…If you click the logo you will see the companies I work with…All Top A Rated 100-150 years old companies. Ones that I’m sure your will recognize!**

**One last thing… can you grab a paper and a pen or pencil for me?**

**Ok Write down….. I’m Dave A…L…B…E….R…O 941-232-1200 Real slow**

**How do you keep track of your appointments…Do you write them down in a paper calendar or digital device …Like your cell phone?**

**If Paper Calendar: Ok is your calendar in front of you? Can you put me on it? That way I know you have me in your schedule!**

**Digital Device: Ok as soon as we get off the phone put me in your cell…Ok also so I know I sent it to the correct number do me a favor and reply to my txt with a thumbs up or Got it……That way I know you have me in your schedule Ok?**

**Sounds like your pretty good about keeping your appointments, right?**

**Super see you Tomorrow @1pm**

**Bye**

**Hi {FIRST\_NAME},**

**Hi From {AGENT\_FIRSTNAME}. Your appointment has been scheduled with myself for {APPOINTMENT\_DATE} at {APPOINTMENT\_TIME}.**

**We work with more than 40 top rated insurance carriers that offer mortgage protection insurance, so at this point I will be going through the various companies and narrowing down your options. My goal is to ensure that you're getting the best coverage for the best price.**

**Looking forward to Helping you out!**

**Best regards,**

**{AGENT\_FIRSTNAME} {AGENT\_LASTNAME}**

**Field Underwriter | {AGENT\_LASTNAME} Agency**

**  {AGENT\_CONTACT}**

**  {AGENT\_EMAIL}**

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First txt………Send Contact

Second txt…. <https://www.simplysfg.com/>

Third txt……..Very Nice speaking with you today. Looking forward to helping you out, see you Tuesday @1PM for our Virtual Mortgage protection appointment.

Send 25 Minutes before meeting

Fourth txt…..Good day to you! I’m getting ready for our meeting in about 25 minutes. I emailed you the gotomeeting link, you can logon a few minutes early to avoid any technical challenges.

Dave