🟦 Standard Life Lead Contact Script Suite

Designed for typical $100K–$250K online/funnel leads where the prospect likely doesn't remember filling anything out

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📞 Phone Script (Live Answer)

Agent:
Hi [First Name], this is [Your Name] — I'm getting back to you about a quick form you filled out recently about coverage for your family. It looks like you were looking at around [$100K–$250K] in coverage — does that sound familiar?

(pause)

If YES or MAYBE:
Awesome. I'm the licensed agent assigned to follow up and walk you through what's available based on your age and coverage goals. It just takes about 15–20 minutes — would today or tomorrow be better for a quick call?

If NO or I DON'T REMEMBER:
Totally understandable — a lot of people fill these out quickly online or on social media. I've got your file here with your info, and it only takes a few minutes to see what might be a fit.

Would later today or tomorrow work better?

☎️ Voicemail Script

Hi [First Name], this is [Your Name] — I'm getting back to you about a quick form you filled out recently regarding coverage for your family. Looks like it was for around [$100K–$250K] — I've got your file here and just need to verify a couple things.

I'll try you again shortly — or feel free to call/text me at [Your Number]. Talk soon!

💬 **Text Message Sequence – Standard Life Lead ($100K–$250K)**

🎟️ **Initial Text Variations (After Missed Call)**

🔹 **Option 1 – Most Direct**

Hi [First Name], this is [Your Name] — just getting back to you about the life coverage request you sent in. It looks like it was for around $150K or so. Just need to verify a couple things — when's good for a quick call?

🔹 **Option 2 – Memory Jog**

Hey [First Name], I'm following up on that quick form you filled out about family protection. These usually cover things like income replacement or final expenses — I've got your file here if you still want the info.

🔹 **Option 3 – Casual & Neutral**

Hi [First Name], just wanted to check in about your recent life coverage inquiry. I've got your info here and can walk you through some options — quick and no pressure. Let me know when's best.

⏳ **Light Nudge (Day 2 or 3)**

Hey [First Name], just circling back in case you're still looking into coverage options. I've got your file handy and can run through everything quickly — happy to help however I can.

🔴 **Final Soft Close (Day 3–5)**

Hi [First Name], I'll go ahead and mark your request inactive unless I hear back. Totally no pressure — just wanted to make sure you got what you needed in case this was still on your mind.

📧 **Email Template**

Subject: Follow-Up on Your Life Coverage Request

Hi [First Name],

Just wanted to follow up on a recent request you submitted about life insurance coverage — it looks like you were looking into options around $100K to $250K.

I've got your information here and just need to verify a couple quick things to help find the right fit. If you're still exploring options, let me know when's a good time to connect — I'll keep it brief and helpful.

You can reply here or call/text me directly at [Your Number].

Talk soon,
[Your Full Name]
Licensed Agent
[Your Phone Number]
[Your Email]

🧠 **Pro Tips for Working These Leads**

✅ **For This Lead Type:**

- **Don't lead with "life insurance."** Use phrases like "coverage," "family protection," or "benefits" — they're less likely to trigger resistance.

- **Pause after the intro.** Give them time to process. If you talk too fast, they'll assume it's a sales call and hang up.

- **Expect memory gaps.** These leads often don't remember filling anything out. Normalize that with soft language like "These usually come through online or social media…"

- **Sound like a real human.** Be casual, friendly, and calm — not overly formal or robotic.

- **Be ready to pivot.** If they say they already have something in place, ask: "Do you remember who it's with?" to begin pre-qualifying.

📌 For Standard Leads ($100K–$500K):

- Mention the amount if it helps. "Looks like you requested around $150K — does that sound familiar?"

- Use emotional framing. "Just wanted to follow up on your request about making sure your family's protected."

- De-escalate objections. If they say "I'm not interested," you can say: "No problem — I just need to close out your file and confirm this is no longer something you're exploring."