



TELEPHONE SCRIPTS

a) New Member Prospect

People love to talk about themselves and their successes, and this script plays to that desire. If you don't know the person's history with NAIFA or how long they've been in the business, this is a good approach to use. Remember, the goal is to get the appointment.

“This is [YOUR NAME] with NAIFA. I’ve heard a lot of great things about you and the success of your practice, and I think NAIFA would be a good fit for you. Did I catch you at a bad time?” [PAUSE]

(IF SO, ASK WHEN IT WOULD BE A GOOD TIME TO CALL BACK. IF NOT, BUILD RAPPORT BEFORE ASKING FOR THE APPOINTMENT)

“I’d love to ask you some questions about what drives you and what’s made you so successful to see if NAIFA can help you like it’s helped me. I’ve got some time later this week. Which day works best for you?”

b) Lapses

Many members don't even realize that their membership has lapsed (didn't see the lapse notice from NAIFA, etc.). Simply remind them that their NAIFA membership has lapsed and offer to reinstate it for them.

“This is (YOUR NAME) with NAIFA-(YOUR LOCAL). It appears that your NAIFA membership has lapsed, and we want to make sure that it wasn't just an oversight. I, too am a member of NAIFA-(YOUR LOCAL) and recognize that the work of NAIFA helps grow my business. Hopefully, you do as well. (possible discussion). If you'd like, I can have someone from our NAIFA-Florida staff contact you directly for the payment information.”

If they would like to renew, simply take the payment information (use member app) and send to Diana Shipley (diana.shipley@naifa-florida.org) in the state office for processing. If they prefer to give payment information to a staff member, please let Diana know and she will contact them.

If they refuse to renew, please document why and let us know the reason(s).