

# Christian OTP Lead Call Script (Trust-Based)

## 1. Opening (Warm + respectful)

“Hi, is this [ Lead Name]?”

OR

“Hey [ Lead Name], this is [Your Name].

You recently requested some information about **making financial decisions that align with your Christian values**, and I just wanted to connect with you real quick.”

*(Pause)*

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## 2. If they don't remember

“That's totally okay, a lot of people request info while looking into different options online.

I'll keep it simple and make sure this is actually relevant for you.”

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## 3. Gentle connection

“Just so I understand where you're coming from, when you requested the info, were you looking for something specific, or just exploring what might be available?”

*(Let them talk, don't rush)*

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## 4. Light faith-based rapport (keep it natural, not forced)

“I also saw this was connected to a Christian-based request.

Is your faith something that plays a big role in how you make decisions?”

*(If yes)*

“I respect that. A lot of people I speak with feel the same way, they want to make the right, wise decisions.”

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## 5. Transition to value

“The reason I’m reaching out is that there are some options that are structured in a way that aligns better with those values, but it really depends on your situation.”

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## 6. Simple qualification

“Are you currently working or retired?”

“Do you already have something set up right now?”

“Roughly what age range are you in?”

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## 7. Position the offer (calm, not pushy)

“Based on what you shared, there’s a good chance there’s something here that could make sense for you.”

“I don’t want to overwhelm you over the phone though, it’s better to walk through it clearly so you can decide for yourself.”

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## 8. Close (low pressure but direct)

“Let’s do this, we can take about 10 to 15 minutes and go over everything properly.”

“Would later today or tomorrow work better for you?”

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## 9. Objection handling

“Just send info”

“I can send something over, but I want to make sure it actually makes sense when you see it.

That’s why I usually walk people through it quickly so they can make a clear decision.”

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### **“Not interested”**

“No worries at all. Just so I respect your time moving forward, is it something you already handled or just not the right time?”

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### **“I need to pray/think about it”**

“I completely understand, that’s important.  
What we can do is go over the information first so you have everything you need, then you can take your time and decide from there.”

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## **10. Confirmation**

“Perfect, I’ve got you at [time].  
I’ll send you a quick reminder so you have everything ready.”