

Sample Call Rotation Script

Based on F.O.R.M. KEEP THE TONE OF THE CALL LOW KEY AND PROFESSIONAL!

Introduction:

Hello _____. This is _____ calling from _____. How are you? Good. I am calling to touch base.

Family:

- Is everyone well? How are the kids?
- Is school just starting/ending/graduating/university, etc, etc.
- Are you planning any holidays? (if calling in or near summer, Easter, Christmas, etc, etc.)
 - You will appreciate the notes you have provided yourself on the client in the past. This is also a time to collect new info

Occupation:

- How are things going at work/in your business/ retirement, etc, etc?

Recreation:

- How is your golf game? Have you improved you ___ handicap?
- Tell me about the Lakers (for example). What are you expecting from them this year?

Message:

- Convey any product or servicing messaging that might be relevant to this client/customer.

Conclusion:

- Reassure them that they can call anytime they like to discuss what ever is concerning them.

Recommendation Process (optional):

- _____ (client name), clients often refer a friend or family member to me who had a few questions about their own financial plans. I find that people often need a reassuring second opinion.
- If you're speaking with someone and the topic of [YOUR PRODUCT OR SERVICE] comes up, ask the person you are talking to if they would be interested in a second opinion. Then put the wheels in motion and call me with their contact information.
- We will follow up, send an introduction kit and arrange an initial meeting to determine if they can benefit from what we offer.