

## Sample Telephone Invitation Script for Client Advisory Council

It is imperative that you personally contact the people you would like to attend your Advisory Council. As a first step in the process, call those clients you would like to invite to participate. The call is a chance to find out if the clients are interested, but neither of you are committed. If certain clients are begrudging their interest, then you are not committed to inviting them to participate.

The following script is provided to help you get started:

- I just wanted to take a moment to see if I could ask you for a favor.
- Over the last little while, I have been working on improving the level of service that I offer my clients.
- In a perfect world, I would work exclusively with clients just like you, and that is why I am calling.
- To be candid, I am thinking of inviting you and a few other clients to an event [eg: dinner] to discuss the services I provide.
- I have a few questions that I would like to ask you, and I assure you that it won't take more than an hour and half.
- Your wife [name] / husband [name] is more than welcome. In fact, I'd love to hear her/his perspective on things..."
- Does this sound like something you would be interested in doing?
- Great [or, thanks anyway, and go to conclusion]
- If I plan to go ahead with the event, I will send you a letter and an invitation with the details.
- Thanks again for your time and interest.