

# Scripts to use with Clients to Gather Information About CAST Professionals

These scripts are guidelines you can use to ask your clients about their CAST professionals. The scripts will allow you to learn the names of professionals your clients are pleased with – potential CAST members – and they will allow you to introduce new CAST professionals to clients who lack or are not satisfied with their existing service provider. If you have more than one possible CAST member in a given field, always recommend the one who is most likely to best match your client’s personality and needs – making a good “match” will enhance your value in the eyes of both your clients and CAST professionals. Whenever you recommend a CAST professional to one of your clients, be sure to provide your clients with informational material from the CAST professional. Also make it clear that your other clients recommend these CAST professionals.

## To Recommend an (ANY OTHER PROFESSIONAL OR SERVICE PROVIDER):

- Who helps you \_\_\_\_\_?
- Well, if you have been using the same person for some time and you are pleased with the service, I’d like to know that person’s name.
- Occasionally, I am asked by a client to recommend a good \_\_\_\_\_, so I like to know as many trustworthy individuals as possible.
- Response: I use \_\_\_\_\_. (if they don’t have an \_\_\_\_\_, see below)
- Are you pleased with their service?
  
- If yes:
  - Why do you like them?
    - I would also, with your permission, like to contact your accountant and set up a meeting with him/her so that we can get to know each other.
      - If yes:
        - Great, could you give me their contact info (if not available, make arrangements to call them to get it).
      - If no:

- Oh, ok. I will certainly respect your wishes, but could I ask why you would rather I not meet with them?
- If no:
  - What do you not like about their service?
  - Well, since do not have a reliable person to help you with \_\_\_\_\_, I would be pleased to recommend another \_\_\_\_\_ to you -- one that would offer you the kind of quality of service you expect.
- If they do not have an \_\_\_\_\_:
  - Oh, you do not have anyone helping you with your \_\_\_\_\_?
  - I would be pleased to recommend an \_\_\_\_\_ to you- one that will offer you the kind of quality of service you expect.