

Telephone Prompter

Approaches

Acquaintance Approach

“Hello, Bob? . . . This is John Agent. Do you have a moment to speak on the phone?”

YES

“.... Bob, (You may, or may not, be aware that I am working for _____) while I do not have any reason to believe that you are in the market for investing money at this moment, I have an excellent idea for saving and accumulating money. I could see you and Kathy _____ evening at _____ (time), or would _____ evening be better?”

Referred Lead Approach

“Mr. Prospect, please? . . .”

“Mr. Prospect, do you have a moment to speak on the phone?”

YES

“This is John agent. Your friend, Bill Client, suggested I give you a call. I shared an idea with him the other night for accumulating and saving money He thought it was an excellent idea and felt certain you would be interested in seeing it. I can see you Tuesday night at 7:00 or would Wednesday be better?”

Sponsored Market Approach

“Mr. Prospect, please? . . .”

“Mr. Prospect, do you have a moment to speak on the phone?”

YES

“This is John agent. I am calling in reference to a letter (The First National Bank / our agency/ a mutual friend . . .) sent you a few days ago. (Mr. Brown, President of the bank), asked me to drop by and review the full services now being offered. I can see you Tuesday night at 7:00 or would Wednesday be better?”

Smile . . . Be Enthusiastic

Responses

Cushion / By-Pass / Choice: You cushion your response, by pass the question and give them a choice of time to visit with you.

Cushions

“I can appreciate that . . .”

“I know how you feel . . .”

“I can sympathize with your position . . .”

If wife answers

“Mr. Prospect please . . .”

“Who is this?”

“This is John Agent . . . is Mr. Prospect there, please?”

What about?

“I appreciate your asking that question, Mrs. Prospect. I just want to speak to him directly, is he there?”

NO, not here

“Fine, it’s not urgent. I’ll call him later. Thank you. Good-bye.”

If prospect is busy

NO

“Fine it’s **not urgent**. When would be a better time to call?”

What about?

That depends!

Who is this?

“Mr Prospect. I appreciate your asking that question. I would like to take a moment to tell you **who** I am and **why** I am calling. Do you have time for that now?”

Feel / Felt / Found

“I understand how you feell, in the past I have felt the same way, but let me get with you to show you what I found. Would Tuesday be Ok or would Wednesday be better?”