

Character Reference

Hello (Reference name) , **this is** (your name). Did (New Recruit) tell you I would be calling? WFA

The reason that I am calling is because (recruit's name) is applying for a position with our company and has given your name as a personal character reference.

Do you have a few moments to answer a couple questions?

1. What is your relationship to (New Recruit)? ___ Relative ___ Friend/Neighbor ___ Co-Worker"
2. How long have you known (New Recruit)? _____
3. Is He/She **Hard Working and Disciplined**? _____
4. Is He/She **Self-Motivated and Ambitious**? _____
5. Does He/She get along with everybody, **fairly Outgoing**? _____
6. Are you aware of any reason (New Recruit) could not be trusted with confidential financial matters or to handle client funds? _____

Well (reference name) I'll let (new recruit) know you had some great things to say and it sounds like he's the type of person we're looking for. Actually (reference name) our company is expanding so rapidly that we're looking for a few other people like (new recruit) . Let me just ask you, who else do you know that has those same qualities as (new recruit) and may be open to a career change right now?

Outcomes

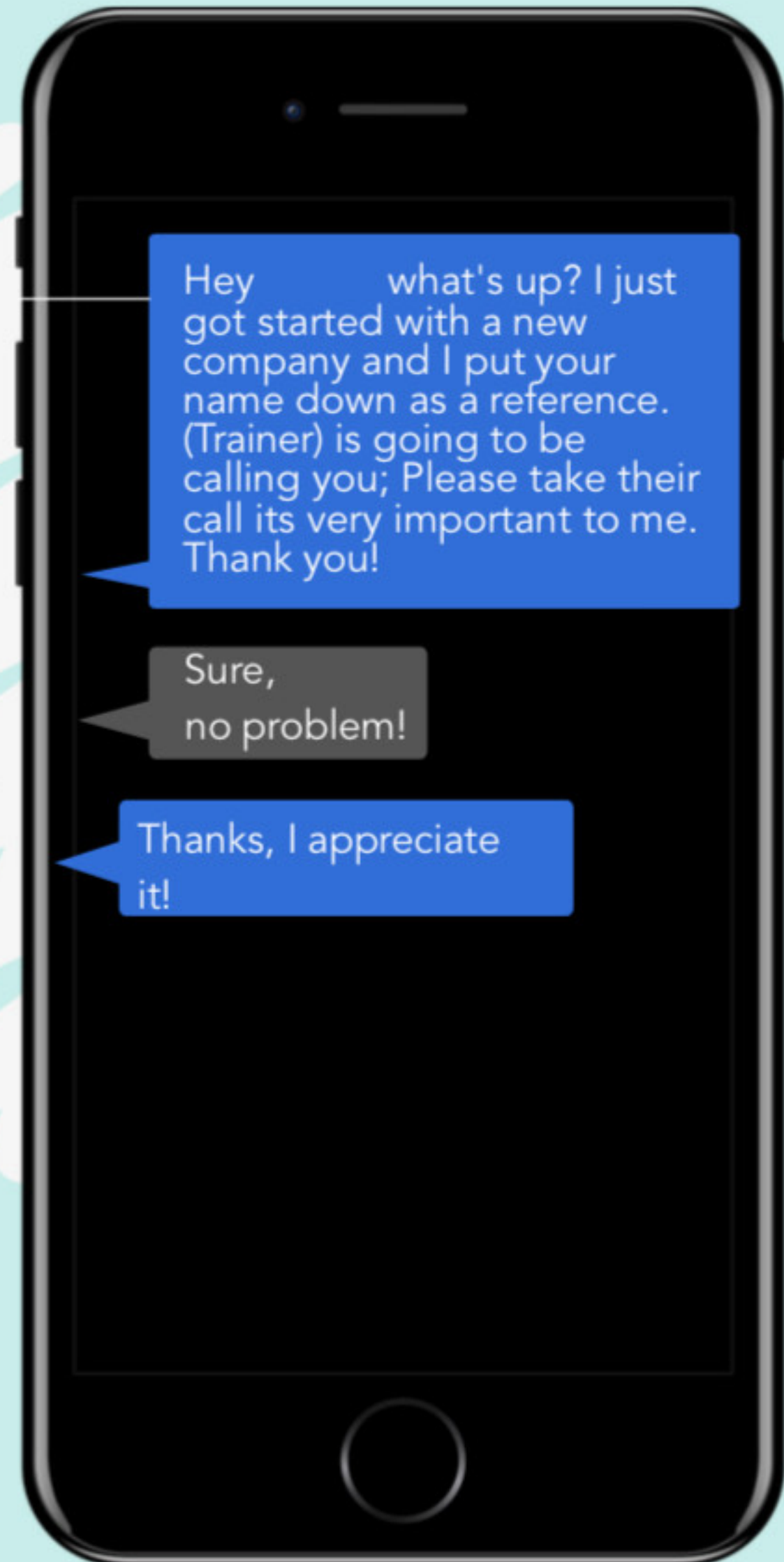
1. They'll be interested. = Book them to an Interview or Business Open House
2. They'll give you a warm referral. = then keep asking for names. **Then Call the referral.** (see other script)
3. They won't be interested or know anyone. = then GO TO "Booking the KT"

Booking the KT

One last thing though. Part of (new recruit's) training is observing presentations. Since that's the case, does (new recruit) have enough credibility with you that we could get 20 to 30 minutes of your time for their training so that you could give them some feedback on what they are going to be doing?

Great, we are working with (new recruit) on (day) , could we meet with you then?

THANK YOU FOR YOUR TIME!"



Personal Reference Check

Reference Name: _____

Number: _____

Answers to questions:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____

Possible Recruit? YES NO

Agree to an appointment? _____ Date? _____

Date? _____

Warm Referrals:

1. _____

2. _____

3. _____

4. _____

5. _____

Reference Name: _____

Number: _____

Answers to questions:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____

Possible Recruit? YES NO

Agree to an appointment? _____ Date? _____

Date? _____

Warm Referrals:

1. _____

2. _____

3. _____

4. _____

5. _____

Reference Name: _____

Number: _____

Answers to questions:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____

Possible Recruit? YES NO

NO

Agree to an appointment? _____ Date? _____

Date? _____

Warm Referrals:

1. _____

2. _____

3. _____

4. _____

5. _____

Reference Name: _____

Number: _____

Answers to questions:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____

Possible Recruit? YES NO

Agree to an appointment? _____

Warm Referrals:

1. _____

2. _____

3. _____

4. _____

5. _____

Reference Name: _____

Number: _____

Answers to questions:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____

Possible Recruit? YES NO

Agree to an appointment? _____

Warm Referrals:

1. _____

2. _____

3. _____

4. _____

5. _____

Reference Name: _____

Number: _____

Answers to questions:

1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____

Possible Recruit? YES

Agree to an appointment? _____

Warm Referrals:

1. _____

2. _____

3. _____

4. _____

5. _____