

## CONTACTING REFERRALS: HAPPY CLIENTS SCRIPT

Hello, may I speak to John please.

\_\_\_\_\_ my name is Columbus Pollard and your (best friend, brother, sister, coworker, etc) \_\_\_\_\_ Sam insisted that I give you a call. I was able to share some information with Sam and his wife that drastically improved their financial situation and they insisted that I share the information with you. I took it upon myself to put together a packet of information for you and your spouse and I was calling to find out which would be a better day to drop off the packet, Wednesday or Thursday? WFA

### **IF THEY ASK YOU TO LEAVE IT AT THEIR DOORSTEP OR MAIL IT TO THEM**

Let them know that you can't do that because there are a couple of pages you need to explain to them so that they will understand all the information in the packet. Let them know that all you need is 20 minutes to drop it off.

What is it: (pick 1 or 2 to tell prospect)

- I showed them how to have 3 to 4 times more in income protection.
  - I showed them how to get out of debt sooner and cut 7 to 10 years off their mortgage with no additional monies.
  - I showed them how to have thousands of dollars more at retirement.
  - I showed them how to make an extra \$15k to \$20k a year part-time.
- That's why they insisted I call and pass this information on to you. So, would Wednesday or Thursday be a better day?

### Client Asks: "What Is It?"

"We show people how to save money, get out of debt, and there is a business opportunity involved."

Client Says: "I'm Just Not Interested."

"(Third party) wasn't interested either. But after I took a few minutes to explain it to him, he said it was totally different from anything he had ever heard, and was so impressed with the benefits that he asked me to give you a call and at least quickly review it with you and (spouse). I told him I'd be glad to. Which would be a better time for you? 7:00 or 9:00 (day)?"

Client Says: "I'm Still Not Interested."

"Oh, did (third party) explain the concept in total detail to you and (spouse)? (Answers.) Okay, because after I took a few minutes to explain it to them, they both said two things. (1) It is completely different from anything they've ever heard; and (2) instead of them explaining it to you, they wanted me to give you all the information. Which would be a better time for you? 7:00 or 9:00 (day)?"

Client Says: "Send Me Some Information."

"Okay, I'd be glad to. In fact, we have a brochure that tells exactly what the concept is. What I'll do (first name) is drop it off so you can review it. Your home address is (number, street), Good! I'll drop it off at 7:00 or 8:00 (day). Which would be a better time for you?"

### Client Asks: "What Is It?" cont.

Client Says: "Tell Me About It Over the Telephone."

"(First name), if I could relay that over the phone I would, but it does take about 20 minutes, in person. As (third party) said, it really did save them some money. I promise you're under no obligation whatsoever, so, which would be a better for you? 7:00 or 8:00 (day)?

Client Says: "Call Me Back After the Holidays."

- Answer #1: "I'd be glad to do that. (third party) said you might want to wait until then. But he told me to at least share the concept with you before (holiday). After I've had a chance to meet with you and (spouse), you'll see why. So which would be a better time for you? 7:00 or 8:00 (day)?
- Answer #2: "I'm Just Too Busy. Call Back Later."  
"Okay, let's do this. We'll save the complete presentation until after (holiday) and what we'll do now is simply give you a preview of the concept. Then you can decide when you want to get together for the rest of the story. Which would be a better time for you? 7:00 or 8:00 (day)?

### PART III: TIPS FOR MAKING THE SYSTEM WORK

1. Practice the system. Use TPRS on each and every call. After you've mastered the program, teach it to others.
2. Stay ahead of the game. If you don't respond to referrals quickly, you'll soon be overwhelmed by the volume the system generates. Share or trade leads with others in your organization if necessary. Just don't let referrals go stale.
3. Spend the time to properly qualify all leads. Quality referrals are absolutely essential. With so many prospects, you won't have time to waste in unproductive calls.
4. Use the system in field training. This is an ideal way to gather referrals for a new recruit whose natural market may be eroded during field training.
5. Utilize the power of the third party. Upon your initial meeting with the referral, the connection you share with the nominator is all you have in common. Use that connection to start building a relationship with the referral.
6. Continue your relationship with the third party after the referral. Share your success stories - and your failures. Ask them to call clients who are reluctant to set an appointment or who have decided not to do business.
7. Don't stop other recruiting activities. Use TPRS to complement activities that your organization may be successfully using.
8. Friendship, curiosity, or "need or greed." Remember: those are the only three reasons a potential client will make an appointment.
9. Avoid high pressure. Clients will more readily provide referrals if they feel you're not going to annoy their family, friends, neighbors or business associates.
10. Always "do what's right." A satisfied client will always be happy to tell others about you and your financial concepts and solutions.