

PFS, Inc. Checking References and Referral Prospecting Follow-up from Interview and Script
Prospects Name: _____

Questions	Reference #1 _____	Reference #2 _____	Reference #3 _____	Reference #4 _____	Reference #5 _____
Would you consider this person a hard worker?					
Is this person very task-oriented? When they set a goal, do they achieve it?					
Do you consider this person trustworthy/ strong integrity?					
Do you consider this person credible? We have found credibility to be the most important quality in determining whether or not anyone would be successful in our company.					
If we were to bring them on board, does he/she have enough credibility with you that you would be willing to help him/her with their training? The reason I ask you that question is because what we've found the most effective is training in front of people who know her/him and care about her/him. This takes a lot of fear out of the training process. (WFA)					

Hi, _____ (reference's name). This is _____ (your name) with PFS, Inc. I'm a representative in charge of expansion at our company. _____ (reference's name) provided your name as a character reference after expressing interest in working with our company. I was wondering if you had a couple of minutes to answer some questions concerning _____ (reference's name)?

"_____ (reference's name) again, I'm a representative in charge of expansion for our company. We are currently aggressively expanding and we have excellent compensation packages at every level of leadership. So _____ (reference's name), if you know anyone who has similar qualities as you have just described _____ (prospect's name) as having, would you please forward their name to me? My name is _____ (your name), and I can be reached at _____ (your number). By the way _____ (reference's name), do you feel you have similar qualities? (WFA)

Would you be interested in a meeting with me about possible opportunities at our company if the money was right?

YES- Great! So _____ (reference's name), all I need to do now is schedule a time when you can meet with me to go over our business overview (or one-on-one) and see how our program and compensation work. _____ (Opp Meeting Day) Night, we have an executive coming in to go over the entire program. I'd like to reserve a slot for you. Can you attend? (WFA)

YES- Great! What is your email address, so that I can get you registered for the meeting? Also, we start promptly at ____:____ p.m. Please log in about 5 minutes early in case you have technical difficulties. If something happens and you can't log on, please call me at _____ (your office number) so I can assist you or so that we can reserve the slot for someone else. It's business attire, with cameras on. I'm looking forward to meeting you.

NO (not right now)- Ok, may I follow up with you (in 2 weeks or next month) in case things change? (WFA- If **yes**, put them on your calendar for a follow-up. If **no**, go to the **not interested** line of the script.)

NO (not interested)- Ok, may I text you a message to forward to others who may be interested? (Text below.)

NOTE: You must always adhere to the Primerica "No Call" policy when using the telephone to prospect.

TEXT: Hey, I met with a financial coach who enhanced the way I view my finances who's also looking to educate others and looking for some sharp people to partner with in business. As a personal favor to me, please take 5 minutes to call _____ (your name) @ _____ (your number).