Example Call Script

This document was written by Greg Russak, for one of his clients, a software company serving the healthcare delivery needs of public and private primary and secondary schools, who needed help with designing a plan and documenting a process for calling their then-current customers to secure a renewal of their service contract. Identifying information in the original document has been replaced or removed which may affect overall readability in places.

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# Executive Summary

This document outlines a generalized call script that can be used immediately and in advance of any other outreach such as letters and emails.

It’s organized into call “segments” starting with Greeting and Purpose of the Call.

This script assumes that the renewal call being made is not a scheduled or promised call and is, for all intents and purposes, a “cold call” to a customer. It can and should be modified where it’s deemed to be appropriate if it’s a call to a “warm” customer.

The text in ***bold italics*** is the recommended message to be delivered by the <CUSTOMER NAME> representative making the call.

## Data Capture

It is highly recommended that data about each call be captured immediately after each call. Waiting to do so later and in “batch” mode tends to reduce the likelihood and quality of the data being recorded.

At a minimum, the data that should be captured from a call includes;

* Customer name, title, and school
* Time and date of the call
* Salient notes on how the call went, including any new and/or relevant info; i.e., changes in staff, feedback on the product, etc.
* Document(s) being sent
* Agreed-to next step(s)

# Greeting

***“Hello, <NAME>. Thanks for picking up my call. This is <CALLER> from <CUSTOMER NAME>.”***

Go right into the purpose of the call unless this is a “warm” customer or the customer engages in pleasantries first.

# Purpose of the Call

***“I’m calling to share some very exciting news about the enhancements and upgrades we’ve made to our software, and to tell you about the special pricing we’re offering to our customers who renew with us before August 1, 2018.”***

# Gain Agreement to Continue

Immediately ask for permission to continue, especially with “cold” calls.

Asking for permission to continue is a best practice when cold calling. It shows respect, and it helps to disarm and diffuse the inherent objection people often have to unexpected phone calls.

***“I know you weren’t expecting this call, so may I ask for just a few minutes to share some of the exciting details with you?”***

A longer alternative version is here depending on the tone you wish to set:

***“I know you weren’t expecting this call, and that it’s been quite some time since we’ve reached out to you. That’s also part of why I’m calling; to apologize for the absence. I’d like to share some important information about our software that your nurses use every day in the critically important care they provide to your kids. You can decide, of course, where we go from there.***

***May I have just a few minutes?”***

# Customer Responses and Your Response

### They answer in the affirmative! You reply with sincere enthusiasm.

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| ***“Great! Thanks very much!”***Skip to Section V. “Making the Case for Renewing” below to share with them the highlights and accompanying value propositions most relevant to them for renewing.  |

### “No, I’m too busy!”

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| ***“Oh, I’m sorry that I caught you at a bad time. The nurses who have seen the new version of our software were all very, very excited and eager to have the upgrade. Even better, we’re waiving this coming year’s subscription fee to all schools who renew by August 1st. What’s a good day and time for me to call you back?”***At this point, they’re likely to either give you a few minutes or want to schedule a call.Don’t be too ready to accept an instruction like, “Call me next week.” If you get that kind of response, answer with….***I know you’re very busy. I have my calendar in front of me. If you tell me what works for you, I’ll send a calendar invitation back to you so that we both know it works for you.***If they still refuse to set a specific day and time, respond with….***“Understood. I’ll send you an email listing a few choices for days and times. You just click the Confirm button in the email next to the one that works best for you. Sound good?”***This specific approach uses the Confirmed™ Instant Scheduler app ([www.ConfirmedApp.com](http://www.ConfirmedApp.com)). Without it, the alternative is to send a traditional email, to which the customer must write a reply that then requires the extra steps of creating and sending a calendar invitation to the customer.  |

### “Just send me the contract”

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| This could be a positive or a negative reaction. Listen for verbal cues like tone of voice, inflection, pace.* + Sound Positive? They could be ready to renew, so don’t sell past the close
	+ Sound Negative? Could be their way of getting you off the phone, so be ready with suggestions that grab their attention and get them really listening and thinking

Let’s start with a positive assumption, and work in the negatives as objections.They say, “Just send me the contract”***“I’m happy to do that right after this call. Let me first get/confirm the details….”**** + It’s usually a positive sign if they agree to give you/confirm the info required such as name, title, address, means for delivery (email, fax), etc.

The next question leads to a commitment on timing:***“Thanks for those details. It’s important that we coordinate our respective efforts, and I know you’re very busy, and I don’t wish to become a nuisance. Let me just ask when I should be on the lookout for the signed document from you?”**** + The response here will tell you if you’re actually on track to getting a signed agreement, or of they were just trying to get rid of you.

If they respond with a date and time, great!* + 1. Thank them
		2. Let them know you’ll send a calendar invitation so that you both have the time set aside
		3. Include the agreed-to date and time in the contract / “Thank you” email you’re going to send with the attached renewal agreement

If they respond with something like, “I don’t know, just send it to me so I can look it over,” you need to be ready to answer in a way that respectfully agrees with their instruction while also reinforcing the importance of knowing their intent:***“No problem, and thanks again for the details. I’ll get the contract to you today.*** ***“I asked about timing only so that I would know when it would be convenient to follow up. Knowing the timing from you also lets me give my product upgrade and training teams a heads up for getting you into their schedules. We’ll be upgrading hundreds of schools this summer, so the sooner I know what your plans are for renewing, the sooner we can start coordinating with your nurse(s) on training prior to the start of the new school year.”***Remain silent for a good 5-7 seconds. It may feel uncomfortable, but silence is powerful. People often feel compelled to fill it. If they don’t respond in that silent time, let them know what you plan to do by asking a respectful question.***“How about I go ahead and pin a reminder to my calendar for later in the week? Would you be ok with Friday afternoon <or some other day a few days out>?”***This is a reasonable approach. You’re trying to manage your time too, and so it makes it hard for them to disagree. If they do disagree or object, respond in a pleasant and professional way.***“Understood. I’m just looking out for you and your nurses. I’ll check back with you in a week or so if I haven’t heard from you before then.”***You’ve made a statement instead of asking for permission. Pause briefly, maybe just a second or two, to let them respond. * They may agree, in which case thank them for their time and end the call
* They may acquiesce and realize it’s to their benefit, too, to answer with an alternate date and time that works for them for you to call back
	+ If that’s the case, thank them sincerely for their time and let them know you’ll be sending a calendar invitation for that date and time so that you both have it on your calendars

**TIP**: Set the calendar reminder for the day before the call instead of some default like 10 or 15 minutes before the call. This makes it harder for them to make a last-minute cancellation.* They may say something like, “No, there’s no need to follow up. I’ll let you know,”
	+ They’ve just increased the likelihood of being a long-shot
	+ Thank them for their time and set a reminder on your calendar to follow up anyway

**OPTION**: Have a senior manager make a “courtesy call” the following day to avail themselves directly to this customer. |

# Making the Case for Renewing

The recommendation is to frame the benefits specific to the individual who has been called, be it a Superintendent, Principal, or Nurse.

A good rule of thumb to follow is the acronym that you can think of a the customer’s favorite radio station, ***WIFFM – What’s In It For Me*** (the ‘me’ being the customer).

While everyone is presumably concerned with the health of children, and everyone presumably wants the school nurse to deliver the best healthcare possible while capturing and reporting the data necessary to remain compliant and for the school to be reimbursed, the order and emphasis for talking points will be different for different people. Considerations and more details on strategy relative to audience segments may be found in the document, “Strategy for Retaining Customers” dated March 23, 2018.

That said and given the fact that <CUSTOMER NAME> knows their product and customers better than we do, here are some suggestions for how to frame the actual conversation about the value of renewing.

## Superintendents / Deputy Superintendents / Principals

For administrators, the recommendation is to put more emphasis on the impact you can have on big picture versus product features. Examples are what the product means for compliance, economics, child health and learning outcomes. If the person being contacted is known to be a user to some degree, then include the elements of the product you know or suspect to be important to them.

Picking up the call from above…..

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| ***“Great! Thanks very much, Mr./Ms. Superintendent!”***Show sincere appreciation***“Let me first say on behalf of everyone here, it’s been our honor and privilege to serve you, your nurse(s), and your kids.*** Assure them of their importance to the business even if they might assume otherwise as a result of any ‘extended absence’, and get them excited about this renewal and upgrade as a watershed event.***We’ve incorporated what we’ve been learning over the years into what is now the most comprehensive upgrade in our history. We couldn’t have done it without customers like you, and we’re very excited to roll it out to you and your nurse(s) this summer.*** You may want to say something here about recent leadership changes. Perhaps something along the lines of….***“Our new CEO, XXXXXXXXX, and our new COO, YYYYYYYYYY, have been tasked by our new investors to lead us into a future in which we work much more closely with customers like you so that we can continue to make one of the best educational health record solutions in the market even better. They’ve asked me to tell you that they look forward to getting to know all of our customers personally, and they’ll be reaching out to say thanks when they have the honor of co-signing your renewal.”***Draw their focus on things likely to matter most to them***“While there are lots of product enhancements that I’d be happy to talk about, let me focus our conversation first on the immediate economic advantages of renewing with us. That ok with you?***Assuming that it is ok with them – AND ASSUMING THE PRICE IS KNOWN***We’re going to waive the annual subscription fee of $$$$$$ per building for customers like you who renew with us before August 1. It’s our way of saying, ”Thank you,” to the schools who have stayed with us over the years and who have helped to guide us toward this greatly improved and enhanced version of <CUSTOMER NAME>.*** Offer a high-level picture of who benefits from the enhancements – nurses and kids***“The product enhancements we’ve made are all designed to serve the nurses, and to allow them to put even more of their attention on the health of their kids instead of doing data entry work.*** ***“We remain HIPAA compliant, of course, as we’ve modernized the look and streamlined the entire nurse experience**** ***Health data on each child will literally be at her fingertips,***
* ***The data she needs to capture for SHARRS reimbursement will be captured at the moment the healthcare is being provided instead of after-the-fact and often after hours***
* ***<2 o4 3 of the more of the most compelling features and benefits that would resonate with Supers….>***

Let them know what you’ll be doing next, and ask them for their direction***“I’ll be reaching out to <nurse’s name>, too, but we felt it was important to start this conservation with you. I’m happy to tell you more about the product enhancements, to answer any questions you have, and to have your direction on what you want me to do next with the renewal agreement.******“How would you like to proceed?***At this point in the conversation, you’re asking for and taking their direction about their buying process. An Objection Handling and FAQ document will likely prove useful to have at the ready.The best outcome is when the DM agrees to have you send the renewal agreement for signature. Be sure to get commitment on when it will be returned. Use techniques like those described previously in this document.Be prepared for them to defer until after your conversation with the nurse to see if she wants to renew. If this happens, respond with…..***“My plan is to call her/him next. Do you mind if I first ask you a question? Can you walk me through how this decision will be made? I want to be sure to understand and respect everyone’s role in this.”***After you get an answer…..***“Thanks very much. That’s very helpful. I’ll be sure to circle back with you after my call with <nurse’s name>. How does your calendar look for a quick check-in call next week?*** |

## Nurses

The recommendation for the call script for the nurse is to focus on a product-oriented “before and after” description of what will be most important to them.

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| ***“Great! Thanks very much, <nurse’s name>!”*** Take price as a possible objection off the table first.***“Before we get into the product improvements and your questions, I just want to share some pretty exciting news. We’re waiving the annual subscription for the 18-19 school year for schools that renew before August 1. I made sure to let <DM’s name> know that, too.*** Assuming that you got the DM to share with you the decision-making process, the segue could be….***“<Your DM> told me that all s/he needs to know is that you want to keep <CUSTOMER NAME>. I’m calling today to do everything I can to make sure you know what’s coming in the upgrade and that you want to renew to get it all for the next school year.***One way to build excitement could be in the form of questions that focus their attention on some of the more well-known shortcomings of the current version – especially any that are known to be an issue with the nurse on the call – and how the new version addresses them. Something like…..***“You know how <feature or function> works today. Well, here’s how we’ve changed and improved that: <description of what’s changed, how it’s changed, and why it’s better>.”***Do this for two or three more issues that will have the most impact. It doesn’t have to be every single feature, function, and benefit. After 3 or 4, try a “trial close,” meaning ask for the order.***“You sound as excited as we are.”***-or-***“We’re really excited. What do you think?”*** -or-***“I knew you’d be excited. Everyone I’ve talked with feels the same way.”***What happens next depends on how they’ve been responding and the response you get to the previous statement. If you detect real enthusiasm, ask for the renewal. ***“That’s great! Sounds like I should go ahead and send the renewal agreement to you / to your superintendent (or whomever) to review and sign. Once I get it back, I’ll route for signature by one of our execs and the upgrade process can get kicked off!”***If there are objections, questions, or pushback, you need to flesh them out and answer each one, ending each with a question like…..***“Is there anything else?”***-or-***“Anything more that I’ve missed?***-or-***“Seems like there’s still something holding you back. What is it?”***You need to keep probing until they say that they have no more questions or concerns. When all the questions have been answered, the only question left to ask is……***“Then we’re ready to sign an agreement?”***It’s a yes or no question. If they say no, you have to go back to asking questions about what it is that’s still a concern. Assuming you’ve asked the DM what the decision making process is and they have shared that with you, you then can talk about it with the nurse…..***“Mr./Ms. Superintendent told me that <describe the role the nurse plays as you understand it from the DM>. Think of me as your doctor. My job is to help you, so I need to know what’s troubling you. What’s still holding you back?”*** No matter how this or any other conversation goes, it’s always important to ask for and to get agreement on a day and time when the next contact will be made, and to send calendar invitations.  |

# Objection Handling, FAQs, Webinars, Videos, Demos

It’s difficult if not impossible to handle objections or concerns that people won’t share with you. That’s why it’s important, even if it’s a bit uncomfortable, to keep asking, “What else?”

The recommendation is to document all the objections you can expect to get from the various types of individuals together with responses. This will ensure accuracy and consistency and give the caller confidence when responding to objections.

The objection handling document should include hard questions from customers that would not serve <CUSTOMER NAME> to have on an FAQ. An FAQ, however, can be derived from the objection handling document. As a customer-friendly and customer-facing document, the FAQ can be an asset ready to be sent as an email attachment and as content in Help systems.

### Webinars and Videos

It would be advantageous to have other assets at the ready to help to convince the skeptics.

* 30-minute webinars
	+ Offered at varying times
	+ Pre-recorded if possible to control the presentation and avoid app/network pitfalls
* Short, single situation/feature/benefit focused videos
	+ 3 minutes or so, max 5 minutes

### Demos

Due to the reality of resource constraints, the recommendation is to offer one-on-one web or onsite demos only to the most strategic accounts, and to invite all others to view videos or attend webinars.