

GENERAL FOLLOW UP SCRIPT

Agent: Good morning! (afternoon, etc.) This is _____ from _____, is _____ available?↓

Agent: Hi _____, thanks so much for taking my call. We spoke _____ (*last week, last month, etc.*) and you were thinking you were going to be, READY TO [*insert motivation here*], in the next _____ (*time frame*). I wanted to touch base to say hello, and see if you are, STILL ON TRACK with that time frame?

Agent: Got it. And do you still want to, [*INSERT MOTIVATION HERE*]?

Agent: Perfect. So, it sounds like the next step to set you up for success would be to setup a time to, MEET WITH ME, etc... (*CONTINUE WITH APPROPRIATE ABC SCRIPT*)

*****IF THEY'RE NOT READY TO MEET:**

Agent: OK, thanks for sharing that. I was wondering, what questions do you have, or, what information do you need, that I can get for you?

*****Only set an appointment if they are wanting to do something in the next 6 months. If not, set a reminder to touch base again within the next 30 days.**

