Setting an Appointment – Help Me Script

Hi _____ , this is _____ (small talk)

I'm calling to let you know, that I recently started with a financial services firm and I'm really excited about it. I'm going through training and I need your help. (Pause, they will usually ask how can I help)

Well I'm in the training program that includes classroom training, getting my licenses and 10 on the job field training appointments. My goal is to get my 10 training appointments done in the next week. I value your opinion and was hoping you and (Spouse) _____ would help me out by being one of my training appointments. You'll help me out, wont you?

(Wait for an answer)

Great, Thanks! What's better for you _____ or _____ ?
(i.e. Wednesday or Friday? Morning or Evening? 7 or 8?)

WHAT IS IT? It's about 30-45 minutes and we will just stop by and show you all the things we do. And then maybe in the future if you know somebody or you hear anybody talk about it, you can give me a referral. If nothing else, I get my training out of the way! Fair enough?

REMEMBER

EXCITED | TRAINING | HELP | OPINION | REFERRALS