

## Referral Phone Approach - Calling Referrals

Hi *(customer's name)*! This is *(your name)*! *(smile)*

I'm not sure if my name rings a bell or not, but I was talking to your *(friend/sister/mom/etc)*, *(referrer's name)*, the other day, and he/she brought your name up.

**\*Replied to 3-way text\*:** Do you remember the text he/she sent you recently?

Awesome! Do you have like 2 seconds to chat?

**DID NOT reply to the 3-way text:** Did he/she get a chance to tell you I would be giving you a call?

**If yes:** Awesome! Do you have like 2 seconds to chat?

**If no:** Oh no... I'm so sorry! I must have beat him/her to it since he's/she's so busy! Do you have like 2 seconds to chat so I can tell you why he/she told me to call you?

Great- How are you? *(family, work, kids, etc)*

**If you have extra rapport info:** He/She actually mentioned you just...

Well, \_\_\_\_\_ *(referrer's name)* and I were talking, and your name came up because he/she said you'd be nice enough to help me out.

**Students:** I'm a student at \_\_\_\_\_, studying \_\_\_\_\_. Right now, I'm interning with a company to gain some business and communication skills as well as build my resume. I also have a shot at winning a scholarship for school!

**Non-Students:** Right now, I'm working with a company to gain some business and communication skills as well as build my resume.

My assignment is to show a product to people I have been personally recommended to, like yourself, and get your opinion on it, and also on me and my presentation!

The product is called CUTCO, have you heard of it?

**If yes:** Okay, cool!

**If no:** No worries! It's basically just some cool stuff for the kitchen.

The best part is I get paid \$25 just for showing it to you so you don't have to get anything.

**Students:** PLUS, if I complete 50 demos this semester, I could win a \$500 work ethic scholarship, regardless of the sales I make!

**If doing a Virtual Demo add:** And because I'm learning about online marketing, I can do the presentation virtually, you just need to be in front of a laptop or computer at home.

I know it's a little bit of a short notice; however, my goal is to complete (##) demos by (3 days away), so I was hoping you could squееееее me in and I could (stop by// or call you) DAY at TIME or is TIME better for you?

**Firm Up:** Okay great (customer)! THANK YOU SO MUCH!

**If you've had a no-show to a demo:** One quick thing, and I know YOU wouldn't do this, but I remember one time that I scheduled an appointment with someone, they said they were going to be there, and then when the appointment time came, they didn't show up, so I didn't get credit for that appointment and the time was wasted...

**Students:** this is so important for my scholarship contest, are you sure that time definitely works?

**Non-Students:** Are you sure that time definitely works?

**In Person add:** Just so I don't get lost, can I get your address and directions?  
(don't rely on GPS!; Put address in "location" section of Google Calendar event)

CONTINUE BELOW

Awesome, will your spouse be there?

**If yes:** Great! Can't wait to see/meet them!

**If no:** Now Mr./Mrs. \_\_\_\_\_, like I said... you don't *have* to buy anything, but most people do; And Cutco is the good stuff, not the cheap stuff. So, I just want to be 100% sure; would you need your spouse to be there to get something if you see something you like?

**If yes or hesitancy:** No worries! Let's find a time when you both can be there.

**If no:** Great! (*book the demo*)

Do you have a pen and piece of paper or your planner? Just let me know when you're ready to write!

(*wait*) Could you write down my name? Again, it's (*your name*). That's \_\_\_\_\_ (*spell it out*). And that I'll (**stop by/call you**) at **TIME** am/pm on **DAY?** And be sure to put a smiley face next to my name so you recognize me!

And like I said earlier, you don't have to get anything. But if you see something you like, I promise I'll get you the BEST deal possible. You can write down my customer discount code for that, let me know when you're ready to write. (*wait*) Awesome, it's \_\_\_\_\_ (*your rep number*)

Thank you so much! You'll also get an email with the day and time of our appointment. What's the best email to send that to? (*use this to put in your vector impact app*)

Great! You'll get the email right away.

I'll (**call you/be there**) **DAY** at **TIME** sharp! Please don't forget about me, as each appointment really helps (*students add->: "and counts toward my scholarship contest*)!

Thank you so much!! I'll see you **DAY at TIME!**