

THE CONTACT

3 Warm Market Appointment Setting Scripts

1. Reference Call Script (Call or Text)

Trainee:

Hi _____! (Small talk)

Listen, I'm excited. I just got started part-time with a financial firm, and I listed you as a character reference for my new position. The team that I'm part of is one of the fastest-growing teams in the country. I'm getting my state license for finance. Do me a favor, my trainer might call this week and ask questions about me and my character, and I'm hoping you can put in a good word for me. And I also checked the box that said you'd help me with the training if I make it through the process. So if everything goes well, they'll get a time with you to help me out for about 30 minutes. Text me if you have questions, and if you can, let me know once they call!

Trainer:

Hi, may I speak with _____?

My name is _____.

We just brought _____ on board, he/she listed you as a reference, and we wanted to call and confirm a few things with you about him/her. Did I catch you at a good time? **(Wait for response)**

How long have you known each other? Where did you meet? **(Wait for response)**

He/she is currently in the process of getting his/her state license to start helping families make money, save money, get out of debt, and pay less taxes. Is he/she trustworthy enough that people could rely on him/her? **(Wait for response)**

Perfect, thank you for confirming our decision. I have another question for you. One part of the training is to get his/her state license, and the second part is that he/she has to watch 10 training presentations as part of his/her learning experience. Does he/she have enough credibility with you where you could help him/her for about 30 minutes to complete one of his/her trainings? **(Wait for response & set appointment)**

2. Training Appointment

Hi _____! (Small talk)

Listen, I need your help for about 30 minutes. **(Wait for answer)**

I got started part-time with a financial firm. I'm new, I'm excited & I'm in training. My goal is to complete 10 presentations with my trainer within the next 2 weeks as a part of my learning experience. All I need is 30 minutes of your and your partner's undivided attention to show you what I do. The more questions you ask, the more I will learn. By the way, once you see what I do, I'm hoping you can help me spread the word and send some referrals down the road. What day would work better? **(Give 2 options)**

**(If they ask, "Sure, but what is it?"
Respond by repeating the script again.)**

3. 3-Way call

Trainee:

Hi _____! Did I catch you at a good time? Do you have a quick minute? **(Wait for answer)**

Listen, I'm calling because there is someone that I want you to meet. **(Wait for answer)**

I am starting part-time with a financial firm. I'm here with my trainer, _____, on the line, and I want my trainer to tell you a little about what I'll be doing.

Trainer:

Hi _____! **(Compliment)**

Great to meet you! Your friend is very excited, he/she just got started with us. How much do you know about what he/she does? **(Wait for answer)**

We are a financial firm that provides education and solutions to help families create wealth and financial freedom. Your friend is in the process of getting his/her state license so he/she can help people start saving money, getting out of debt, and building financial security. How important are these things? **(Wait for answer)**

I am his/her trainer, and I will be spending the next 90 days teaching him/her our business. Your friend and I wanted to invite you to our office/or on Zoom for about 30 minutes and show you what he/she does, and you can help him/her spread the word and give him/her some referrals. What day would be best for us to do that? **(Give 2 options)**