

SETTING THE APPOINTMENT

PHONE TIPS

Always start a phone time with a **SPECIFIC** goal for the number of appointments you want to achieve **YOUR** income goals.

The Phone Must Dos:

- Smile when you dial- people can tell the difference, KEY: look in a mirror when you call
- Always offer a choice of two times
- Know when you want to set the appointments before you start calling
- Be enthusiastic, it is **HOW** you say something
- Read back the directions to the customer
- Consistent phone effort = consistently bigger paychecks
- **Follow the Approach Word for Word: The Phone is Your ATM**

The Phone Must Not Do:

- Don't set up appointments more than 3 days in advance.
- Don't be afraid to ask for an immediate appointment.
- Don't sell over the phone. The objective is to get an appointment.

I. PERSONAL CONTACT APPROACH

We call this the HELP Approach:

Hello (name). This is _____. How are you? Hey, the reason I am calling is because I am in this really awesome college internship or I am helping launch our Knoxville office and...

- **HELP:** I could really use your **help**
- **EDUCATE:** As part of my training, I am **educating** 15 families/day on a service that helps them live worry-free from everyday life issues, including the #1 crime in America, ID theft.
- **LEARN:** You may or may not be interested, but you will love **learning** about it, it will only take about 15 minutes, and I promise the presentation will be of great value to you.
- **PEOPLE:** Plus, you may know some **people** would want it and that would really help me out.

By the way, you don't have to get anything, so you can relax. Our #1 goal is to educate consumers so they **KNOW** how to protect themselves. I need to do _____ appointments before _____, so I wanted to know if I could stop by on _____ at _____, or would _____ be better for you?

Thank you so much, (name)! This appointment is really important to me. Do you have a pen and paper? Could you please jot down that I will be there on _____ at _____? Thanks again, you are helping me hit my daily goal! (Get directions if needed.)

**NEVER USE THIS APPROACH WITH YOUR REFERRALS!
THIS APPROACH IS ONLY TO BE USED WITH PEOPLE YOU KNOW FROM YOUR
INITIAL LIST.**

II. NEIGHBOR REFERRAL CONTACT APPROACH (to fill in gaps)

“Hi! Mrs. _____? (or “Hi, are you the mom”)? My name’s (first name). I’m the one who’s been sitting down with all the families here in (name neighborhood), educating people about how to live worry free from every day issues, including America’s #1 crime today, Identity theft. I was just talking with _____ and _____ and wanted to be sure to catch you for just a minute; they thought you’d really love to learn about what I showed them. “Let’s see...you have your own business and a couple of teenagers (share pre-approach info you gathered), right?” Great! I’m going to share with 15 families today, so I only have a couple minutes to explain it. Do you have a few minutes right now, I am just down the street, I promise I will be in an out and the presentation will be of great value to you, just like it was for the _____’s and the _____’s.”

They still don't know what is going on...

“I guess you haven’t heard about me yet? Like I said, my name is _____ and I am studying (your major) at (your college). I am doing an internship this summer, and as part of my training I have been educating families on a service many have been getting like the _____ and _____. If you like it, cool. If not, no big deal. All the families here in _____ have been really nice as long as I don’t take more than 15 minutes. Do you have a few minutes now while I am in the neighborhood?”

If the customer hesitates, say:

“You know what, I don’t even need to come in, I can just drop by and show you real quick on your porch.” I need to educate 15 families a day and giving you a quick presentation will really help me meet my goals for the day. Can you help me out?

You don't have to get anything, so you can relax. Our #1 goal is to educate consumers so they KNOW about the service. I need to do _____ appointments before _____, so I wanted to know if I could stop by on _____ at _____, or would _____ be better for you?

Thank you so much! This really helps me out! This appointment is really important to me. Do you have a pen and paper? Could you please jot down that I will be there on _____ at _____? Thanks again, this will help me hit my daily goal! (Get directions if needed.)

III. REFERRAL PHONE APPROACH

This approach works perfectly with people that you kind of know, but you may not feel comfortable calling with the other approach.

Role Play the approach

Hi _____ this is _____. How are you doing? I don't know if my name rings a bell, but I am (neighbor, child's friends, etc). They were excited about our service and thought you might benefit from taking a look too. I am working in a college internship program and as part of my training, I need to educate 15 families/day about how to live worry free from America's #1 crime

today, Identity theft. I'm pretty new so right now I'm practicing with people that I'm kind of acquainted with. Now, please understand that you don't have to buy, you just need to listen and give me feedback so I can get better. I really need the practice. It's a lot of fun and only takes about 15 minutes. It also helps me gain presentation experience which is great for my resume. I know you're really busy because it's _____, but I'm trying to hit my daily goals and in order to do that I need some more appointments for _____. So, if you could squeeze me in at _____ or would _____ be better for you-it would REALLY help me out!

POSSIBLES QUESTIONS

"What is the service?"

To be honest it would take me 45 minutes over the phone to tell you. I only get credit for personal presentation, and they only take about 15 minutes in person... would you help me out and give me 15 minutes tomorrow at _____ o'clock or would _____ o'clock be better?

"It's a service that helps customers live worry free by giving them access to over 5000 attorneys & Identity theft specialists, nationwide, for help with everything from the trivial to the traumatic for just pennies a day, have you ever heard of it before?"

"No": Most people haven't! With over 80% of people in Europe using it, that's why we dedicated to educating the families in America. So would _____ or _____ be better for you?"

"Yes": "That's great! Like I said, I am doing it for the training and I'd love to get your opinion. Plus, I get credit for just making the presentation anyway. So would _____ or _____ be better for you?"

"That time does not work" or "I'm really busy."

"OK, well I really need to do _____ appointments by _____, so how about at _____, or would _____ be better for you?"

"How long does it take?"

"Not too long at all, my part is about 15-20 minutes. After that it's up to you. So which time would be best for you, _____ o'clock or would _____ o'clock be better?"

"I'm not going to buy anything."

"That's okay because I get credit for the presentation even if you don't get something and I have a goal to make 15 per day. Can I count on you to help me out?So which time would be best for you, _____ o'clock or would _____ o'clock be better?"