

SETTING THE APPOINTMENT- Group

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:

- Your goal is to set up appointments within 3 days of the call for a sense of urgency.
- Don't be afraid to ask for an immediate appointment.
- Don't sell over the phone. **The objective is to get an appointment.**

Cold Marketing is NOT our #1 method to obtain appointments, but with Identity Theft everywhere the need is so high that even cold calling is working! This script should only be used by those who have previous success in the B2B markets or cold calling.

NOTE: *The most successful method to build a successful sales and marketing team in LegalShield is to share the service with people you care about then get referrals from your satisfied customers. We present to our sphere of influence so they are fully educated on the value of our service, then ask for referrals to the power of 3: consumers, companies and Associates!*

Cold Calling Process is to say...

1. Who I am
2. Who I am with
3. What I do
4. How to help others
5. Ask for appointment

COLD CALL SCRIPT:

1. **Hello, my name is** _____

2. **I am with LegalShield**

Have you ever heard of us? (yes/no, doesn't matter...continue)

3. **What we do is:** offer legal plans and identity theft plans for your employee's protection or...

What we do is: offer the #1 most requested voluntary benefit today, legal and IDT protection

4. **We help to:** reduce stress and absenteeism and increase productivity.

5. We can offer this at **no cost to your company** like we have already done for over 80,000 companies and municipalities nationwide.

6. I would like to **schedule a short visit**, to put a name to a face....I will bring more valuable information to help you understand how this program can benefit you.

Yes OR No : Schedule the appointment

50 calls = 5 decision makers answering = 1 DM appointment

I'M IN THE AREA SCRIPT:

Use this to become more productive and set up additional appts near your existing appts!

1. Hello, my name is _____

2. I am with LegalShield and work with two 40 year old companies who help improve employee performance and reduce absenteeism at cost to the company.

Have you ever heard of us? (yes/no, doesn't matter...continue)

3. I will be helping abc company right down the street from you next Tuesday and would like to stop by for 15 minutes, introduce myself and share why 80,000 companies and municipalities are offering our service. It might be a good fit for your company too.

4. Would the morning or afternoon be better for you?

BROKER/INSURANCE MARKETING SCRIPT:

Use this kind of approach once YOU have had success helping a certain kind of business in a niche market such as Brokers and Insurance Agents.

1. My name is _____

2. Our company has partnered with other successful brokers/insurance professionals like you to offer 2 unique services that will help your clients' bottom line while adding additional revenue to your business.

Have you ever heard of us? (yes/no, doesn't matter...continue)

3. I'd like to stop by next Tuesday while I'm in the area and introduce myself and briefly share our services with you and then you can decide if we are a good fit for your agency.

4. Would the morning or afternoon be better for you?