

The “ABC’s” of a 3-Way Call (for the Coach/Expert)

3rd Party Confirmation Call: If your trainee has already invited their friend without you and told them someone would call to confirm their attendance, say “Hello! This is Ed Expert calling on behalf of Tim (trainee), is Pam available? Hello Pam! Tim told me you’d be joining him on ___day at ___ time to learn more about the new project he’s working on and I wanted to thank you for supporting him and let you know we look forward to getting your feedback afterwards!” **Make sure they know the date, time, location, and what to prepare. However, if the trainee is introducing you on a normal 3way call do the following...**

TRAINER (Ed Expert) says something like this:

A. “Hi, Pam. This is Ed Expert, it's a pleasure to meet you by phone!”

B. “Tim just started working with us on an expansion project and we asked him who else he knew who is either sharp and keeping their income options open, or may be a good referral source for him and he thought of you! Sounds like you made it to the top of his list today! Tell me a little more about yourself... What kind of work do you do now?” (Listen) “Ok, and are you keeping your income options open right now?”

If YES, ask: “Are you looking for something parttime or something more significant than that?”

If NO: “No problem, if we shared some information with you about what we do, would you take a look and let us know who you think might be a good person we can talk to?”

C. “Ok, what I’d like to do is get some information in front of you so you understand what we do, how we help people, and if you or someone you know may be a good fit for what we have available.”

If inviting directly to an event say: “We have an event on ___(day) at ___(time), Can you get free?” (If so, confirm their attendance, remind them that it’s professional attire, they’ll want to bring pen and paper, ask if there’s anyone else they’d like to bring, and let them know you’d look forward to reconnecting after the event to receive their feedback. and get off the phone. If they can’t get free, find another event that works.)

If leading them to an exposure tool first, say: “Do you have ___ minutes now? Great! I’m going to have Tim connect you to a ___ minute overview so you can jot down what you like best and any questions you have. As soon as you’re done, Tim will reconnect us so I can get your feedback. Based on your response we’ll see where to go from there. Sounds good? Great! Talk to you shortly.” (See the next section for tool options)

Experts: Remember to keep it brief. If the referral insists on knowing what we do, let them know: “We provide services that empower people legally and economically. We have several divisions and opportunities available within the company, but all of the information will be covered during the overview and from there we’ll be able to see if there's a good fit for you or someone you may know.”