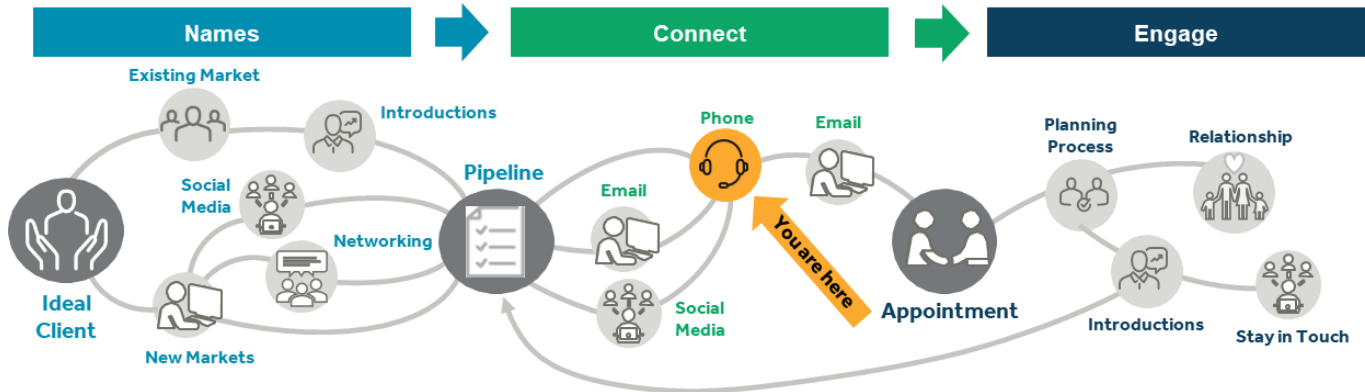


Quick Card

Telephone Prospecting Call Framework



Pick up the phone! You've identified your names, now how are you going to connect with them? The most effective way to connect with prospects or existing clients is with the phone.

A Repeatable Call Framework

A consistent call framework reduces stress and helps speed your call preparation – for both your natural market and new contacts that you have acquired through introductions, networking or social media. **See examples on following pages.**

Steps	Purpose	Example	Tips
1 Grab Attention	Grab the prospect's attention by saying their name.	"Hi Cynthia."	<i>Don't ask, "How are you doing?" and don't pause.</i> <i>Say their name and keep moving.</i>
2 Identify Yourself	Right up front, say your name and agency. Identify the person who referred them.	"This is (name) from (agency)." "Our friend (name) suggested that I give you a call."	<i>If the contact is someone you know well, it isn't necessary to mention your agency.</i>
3 Reason for Call	Give the reason for your call.	"I'm calling to grab a few minutes of your time." "I'm calling to do some mutual networking."	<i>Be open about the objective of your call.</i> <i>People value transparency.</i>
4 Because	Give them a relevant reason to give up their time.	" BECAUSE I help people like you get organized with their finances – reduce the stress and make life feel more manageable."	<i>Say the word "because."</i> <i>Your because statement should be about the prospect, not about you.</i>
5 Ask	Ask confidently for what you want . . . and then shut up.	"How about we get together on Thursday?"	<i>Be confident, direct, and don't pause. Then be quiet and let the prospect respond.</i>

Applying the Framework: Call Examples

Note: Additional call examples can be found on Guardian U in the [Telephone Prospecting Playbook](#).

Who?	Example Approach
Young Families	<p>Key Need: Get Organized and Simplify Life</p> <p>“Hi, Rick, this is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE having a young family can feel overwhelming. I help people get organized financially and bring order to the chaos – which can help eliminate a huge amount of stress from your life. I thought you might be curious to hear about how I’ve helped other people simplify their life.</p> <p>How is Tuesday at 3 PM?”</p>
Established Professionals	<p>Key Need: Protect and Achieve What Matters Most</p> <p>“Hi, Julie. This is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE you’ve worked hard to grow your career and your family. I help people like you protect what you’ve achieved and work toward your next goals – whether it’s college funding, lifestyle or retirement.</p> <p>I thought you might be curious to hear about strategies that are working for other people like you.</p> <p>How is Tuesday at 3 PM?”</p>
Pre-Retirees	<p>Key Need: Planning for Retirement</p> <p>“Hi, Chris. this is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE you’re probably thinking about when and how you’ll retire. You’ve worked so long to acquire wealth; I want to help you make sure that you’ll have enough money to realize your dreams. When was the last time that you met with your financial professional?</p> <p>I thought you might be curious to hear about plans I’ve created for other people like you.</p> <p>How is Tuesday at 3 PM?”</p>
Natural Market – Friends and Family	<p>Ask for Introductions</p> <p>“Hi, Rick, this is (name). “I’m calling for a business reason but first {insert personal question} . . .</p> <p>Let me put on my professional hat for a minute. I’m also calling to do some networking.</p> <p>BECAUSE a lot of young families are looking to get organized and on track financially – which can help eliminate a huge amount of stress from their life. I’d like to learn of people you care about personally or respect professionally who might be curious to see how they can take control of their financial life.</p> <p>Do you have 10 minutes to chat? Also -if there is any way I can help you or answer any questions based on your goals, I’m glad to return the favor and be your personal resource.”</p>
A Referral	<p>Connect with a Referred Prospect</p> <p>“Hi, Frank, this is (name) from (agency). Our mutual friend (name) suggested that I call to set an appointment.</p> <p>BECAUSE I’ve been working with (referrer name) to help with a strategy for (need) and she suggested that you might have similar concerns. I thought it would make sense to get to know you and your specific situation and share some of the things that are working for people like you.</p> <p>How about Tuesday at 1 pm”?</p>

Tips

Customizing Your Approach

When You're Calling Someone, You Know Well

- Respect the relationship. Start with a friendly conversation. But, either at the start or at some point during the call, mention your call's business purpose, such as:
"I'm calling for a business reason but first {insert personal question} . . ."
"Let me put on my professional hat for a minute. I'm also calling to grab a few minutes of your time."
 - Just say your name, it's not always necessary to mention your agency.
"Hi, this is Ann."
 - Add personal details to your because statement, such as:
"BECAUSE, with three talented kids, you've probably been thinking a lot about college funding."
"BECAUSE, you and (spouse/partner) have talked about doing more traveling once you retire."
-

When You're New and Doing Joint Work

- Don't exaggerate your personal level of experience. Talk about the experience of your firm, team, partner.
 - Set up a follow-up call with your joint work partner to get to know the prospect, typically 2 days before the meeting.
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To Expedite the Process

- Once the prospect has agreed to the appointment, you may want to take a few minutes to do some "pre-discovery".
"To help me prepare for our meeting, would it be OK if I ask you a couple of questions?"

How to Connect in a "No Pick Up" World

Become a Contact

When calling people on their cell phones, it's much more likely that they will pick up if you are a recognized contact. When meeting someone in person, have a professional contact card on your phone ready to exchange – via email or air drop.

Set Phone Dates

When you meet a new person, ask if it's OK for you to send them an invitation for a follow up call ("phone date"). This will put the call on their calendar so that they are expecting to hear from you. Then be sure to send an email or text confirmation.

Use Voice Mail

No matter how proficient you become with the telephone prospecting framework, a majority of your calls are still going to go to voice mail.

Use this repeatable voice mail framework to improve your callback rate:

1. **Identify yourself and your agency.** This makes you sound professional.
2. **Say your phone number twice,** slowly.
3. **Tell them the reason for your call.** Transparency is respectful and professional.
4. **Give them a reason to call you back.** Make them curious about how you can help them.
5. **Repeat your name and say your phone number twice.**

Key References

- Guardian U >> Market Development >> [Essentials of Telephone Prospecting](#)
- *Fanatical Prospecting* by Jeb Blount. Available for purchase from www.Fanaticalprospecting.com