

Appointment Setting Script:

Call – Talk low and slow....no pauses...calm...assertive

Hi Greg, it's Liz from..... How are you doing? Good – how is your family?
Awesome, awesome.

So listen, the reason I'm calling, I don't know if I had mentioned this to you or not the last time we talked, but I've actually gotten some financial licensing, and I just want to set a time to pop on zoom, this will take about 20 minutes, and show you and guys what I'm doing, so if you, or someone you guys know in the future, could use what I do, I'd just love for you to know enough that you guys would feel comfortable referring me.

My business is all referral based - so it's my lifeblood.

So listen, as far as us chatting when are you and your spouse generally together, weekends, weekdays, evenings?

Ok – Saturday or Sunday – Ok, what time during the day on Saturday morning, afternoon, evening?

Perfect, and I book my whole day out around these appointments, so please put these on your calendar, and don't leave me hangin on zoom, all dressed up and ready to show you what I do, OK? And listen, don't text or email if you need to reschedule, because sometimes I don't get those, please call me, ok?

OK listen, I've got you down Saturday at 10, unless you or I die before then, I'll see then. OK...bye!

Really need to chat with my spouse, just don't feel comfortable making an appointment without her/him. Hey Greg, listen, yes you can. I know you're busy, and she's busy, I'm busy too, and things come up – I just don't want you to forget and maybe feel bad about not getting back to me. So just generally speaking, just generally, what would be better, and repeat the times. So listen, I'm going to pencil you two in for, talk to her, let her know what is going on, and if for some reason that time does not work,

please shoot me a call back with 2-3 times that will work for you, and we'll go from there. Fair? Repeat post close.

Push back again: I'm just not going to set a time without asking my wife/husband. OK got it, I totally appreciate that, so absolutely, please talk to her and then give me a call back, and If I don't hear back to you by Sunday, can I have your permission to call back? Alright, because this is really important and I really do want you to see this.

What company is it? Friend, thank you for asking, it's a company called Primerica financial services, I'm sure you've heard of us, so as far as an appointment, what's better again, weekends, weekdays?

What is it exactly that you're doing? Name, thank you so much for asking that question, great question, basically we're helping people to save money on debt, save money on taxes, save money on insurance, and teaching them how to take some of that savings and actually save it for things like retirement, and kids college education, you know starting a business. It's really, really pretty incredible. So listen, as far as us getting together, weekends, weekdays?

You know, I'm too busy right now. Can you call me back next week, next month, next year. Just don't have the time. Name, thank you for bringing that up, I know how busy you are, and you know normally when people say that to me (name) what they're really saying is they think I'm going to meet with them, and waste their time trying to sell them who knows what. Is that kinda how you feel?.....You know, listen (name) I don't want to waste your time, and I definitely don't want to waste my time. Give me 15 minutes, and if in 15 minutes what I'm showing you is not unbelievably interesting to you. Let me know. I'll stop. We'll never talk about it again. Is that fair? Ok great. So as far as us getting together, what was better, weekends or weekdays?

Well, I'm just not interested. Man (name), thank you so much for bringing that up, like I said, you may not have any interest, but for sure, somebody you know would benefit unbelievably from this. So listen, you may or may

not be interested, that's fine, give me 15 minutes, and if in 15 minutes not interesting to you we'll stop and never talk about it again, but listen, I really want you to see this, if not for you, for the people in your life you love and care about who are struggling financially right now. So listen, as far as us getting together what's better, weekends or weekdays?

Well, I already have a financial advisor. 2 ways: Man (name), that is awesome, so good, way ahead of most people. (Name), let me ask you a question if that's ok. Out of curiosity, is this your first financial advisor, or have you had somebody before? My first, or I've had someone.

I've had somebody before: awesome, great, so why did you make the switch from where you were to the person you have now? (Will say something, "there was an improvement, I like this new one better, better product, lower prices). Awesome, so it sounds like, correct me if I'm wrong, sounds like you found an improvement, so you took advantage of that improvement and you made a switch, right? OK. Awesome. Let me ask you another question if I could (Name). So, you found an improvement, you made the improvement. Is it at least within the realm of possibility that there may yet again be another improvement that could be made? It's at least possible, right? There could be something even better! So, you seem like somebody who likes to get all the information, who likes to make informed decisions, who even acts on it when you find things are better? Ok, so let me get you some of that information. Ok. If there's an improvement, at least you know. And if there's not, you know you are doing everything 100% right now. Your person is doing a great job, either way, you win, right? So as far as us getting together what's better for you guys???

No, this is my first one. Awesome, great, it sounds like you're probably pretty happy with them. Ok – awesome. Great. So let me ask you a question, if you walked into the doctor's office tomorrow with arm pain. The doc looked at you and said, (name) listen, I've got a solution, we're gonna amputate, I've got a surgery room ready in the back, just go get washed up, put on the gown, and in 30 minutes we'll have one arm. So, just go on now and let's get it done. Would you say, "Sure doc, sounds good. I can't wait to have one arm". Or would you first go and get a second....pause.....and

they say OPINION. Right, I know it's not your arm, only your entire financial future, right, no big deal lol – ok – wouldn't it make sense to get a second opinion on something as important as your finances. Of course. So listen, let's get together, let me get you some information, and the worst thing that happens is, maybe you're doing everything right, and now you know that the opinion you got is the right opinion, and if you're not, I'm sure you'd at least want to know, weather you took action on that or not is fine, but, you'd at least want to know. Listen, as far as us getting together, what's better, weekends weekdays?

Just won't set an appointment/very weird about it: Are you feeling like if I meet with you for 15-20 minutes I'm just going to waste your time? Yeah, I got that - I promise, I'm not interested in wasting your time or my time. If I didn't think this was a life-changing opportunity I would not be reaching out, I'm not going to try to sell you a \$1000 vacuum I promise. Also, if in 15 minutes you don't see the value in this, you tell me and we'll never talk about it again, no hard feelings...fair?

RECRUITING:

Not married, no kids.

Short small talk

Hey, the reason I'm calling is I want you to take a look at something I'm doing on the side right now, this could be a really, really phenomenal opportunity for you. OK so listen, I want you to make some time, like 30 minutes for me tomorrow via zoom. What time tomorrow could we see each other for 30 minutes? Afternoon, evening, what's better for you?

What is it? Thank you so much for asking – it has to do with money and finance. I'll share more with you tomorrow when we get together. Just trust me. I want you to look at this.

What company is it. Man, thank you for asking – it's a company called Primerica financial services. I'm sure you've probably heard of us, so listen, what time tomorrow can you see me.

I'm really really busy, I don't think I have time to do anything else. Tim, man, thank you so much for bringing that up. You may not have time, you may not even be interested, ok, but when you see this, you're gonna know somebody who is interested. So when can I see you tomorrow?

All via zoom.