

# SAMPLE CONFIRMATION CALL MESSAGING

Following your events, confirmation calls should be made by 10 a.m. the following morning to every prospect who set appointment the previous evening at your event. Making these calls punctually is evidence that your firm is attentive to detail, carries through on its commitments and operates with excellence in all that you do. Remember, it is imperative that you have very personable, confident staff member making these calls. A bashful, task-oriented, administrative-minded staff member may see these calls as simple tasks to complete, and he or she may not employ the conversational instincts necessary to retain appointments should prospects find that the previously set appointment time will not work for them.

With those principles in mind, here is a sample script for these calls:

Good morning! Am I speaking with Mr./Mrs. \_\_\_\_\_? This is [FIRST NAME] calling on behalf of [FIRM NAME]. I'm calling to thank you for joining us last night for our workshop at [VENUE NAME]. We hope you enjoyed yourselves – did you have a good time?

Wonderful! Well, it sure was a treat to meet you, and I know [ADVISOR NAME] is looking forward to sitting down with you to get to know you better in your visit coming up. As we promised last night, I'm simply calling out to make sure the appointment time you set last night lines up well with your calendar as we left last night with several people wanting to get in, so I just want to confirm your time will work as planned. I have you down to come visit with us on [DAY & DATE] at [TIME] – is that still going to work for you?

## **[IF NO]**

That is not a problem. Let me open up our remaining available times over the next few weeks and give you a minute to review yours as well. What days and times work best for you in the next two weeks? [RESCHEDULE AS NEEDED – KEEPING THE APPOINTMENT, IF AT ALL POSSIBLE, WITHIN THE NEXT 10 BUSINESS DAYS.]

(continued on back)

**[IF YES]**

Perfect! Now, [PROSPECT NAME], we have already set up a visit folder for you with notes that you specifically wanted to discuss [INSERT CONCERNS FROM RESPONSE FORM FROM EVENT]. While I'm at it here, are there any other initial concerns or things you'd like me to note that you want to make sure [ADVISOR NAME] covers?

[NOTE RESPONSES AS NEEDED.]

Got it! And finally, [PROSPECT NAME], are you familiar with our office location? [PROVIDE DIRECTIONS AS NEEDED.]

Now, I have your email address from last night as [EMAIL ADDRESS]. Is that correct? Alright, wonderful! Well, we've got you all set to come see us on [DAY & DATE] at [TIME], and as soon as we hang up, I will send you an email reminder to that effect, and it will include my name, our office number [and, if applicable, a list of the items you should bring with you to that appointment] and if you should need anything between now and then. We can't wait to see you – have a great rest of the week!