

SAMPLE REMINDER CALL MESSAGING

One to two days prior to all scheduled appointments, someone from your team should be providing personalized reminder calls to all prospects. 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/afternoon! Am I speaking with Mr./Mrs. _____? Hi, this is [FIRST NAME] calling on behalf of [FIRM NAME]! I'm calling to remind you of your visit scheduled with us [DAY & DATE] at [TIME]. We have got everything ready on our end for your arrival – is that time still good for you?

[IF NO]

[PROSPECT NAME], I understand. That is not a problem. We all have life happen, don't we? That is not a problem at all. I tell you what, let me look to see how quickly we can get you right back in for a visit because I know this was important to both you and [ADIVSOR NAME]. [OFFER ADDITIONAL TIMES AND DATES WITHIN THE NEXT 10 BUSINESS DAYS.] Now, [PROSPECT NAME], are you sure that time will work for you? Great! Well then, we've got you rescheduled on our end, and we'll look forward to seeing you on [DAY & DATE] at [TIME]!

[IF YES]

Wonderful! Well, [PROSPECT NAME], we're all set on our end and can't wait to see you! Now, you're familiar with directions to the office and good to go? Perfect! Well, we'll see you at [DAY] at [TIME]!