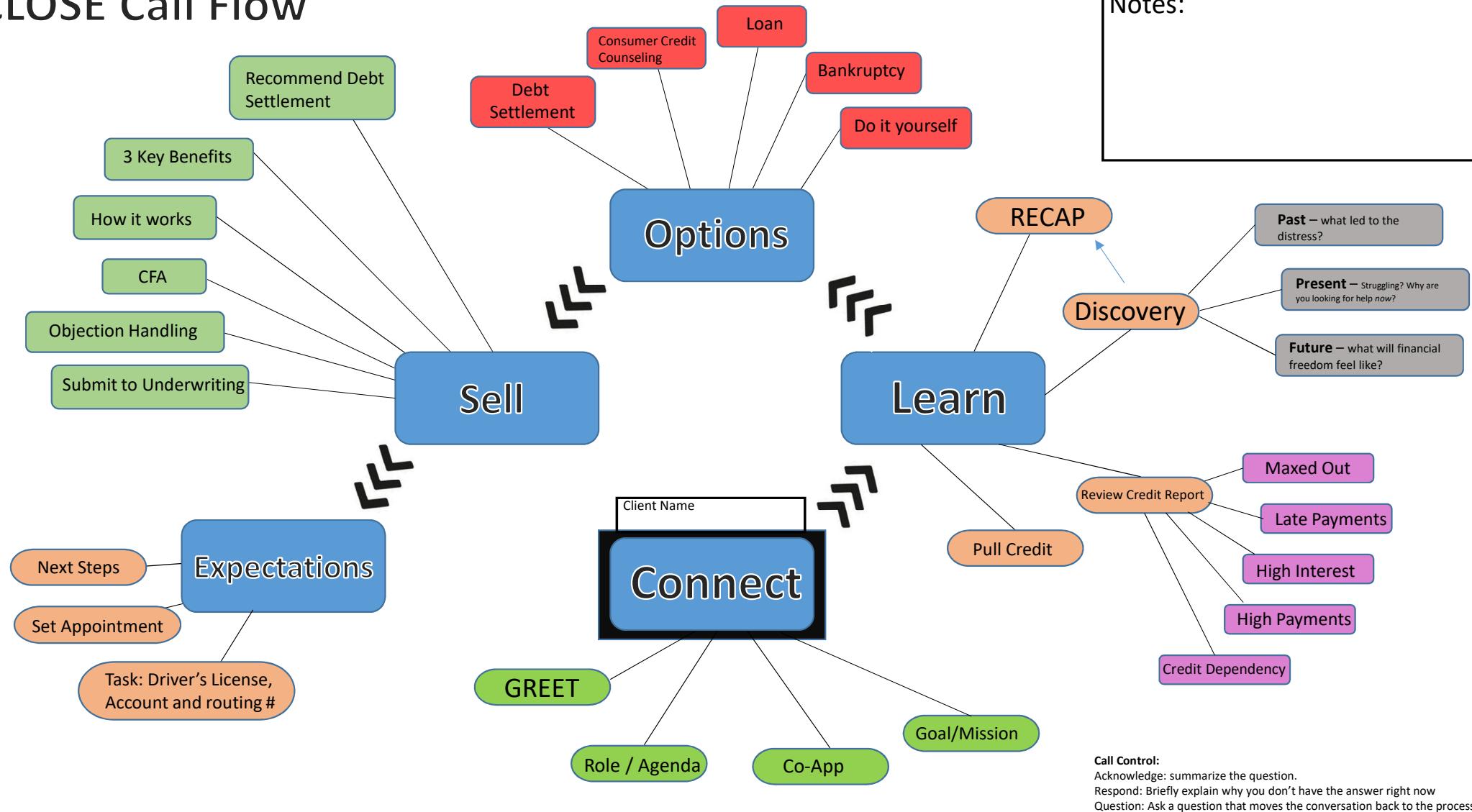


# CLOSE Call Flow



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Connect

Learn

Options

Sell

Expectations

OUTCOME 	<input type="checkbox"/> Connect & Build Trust <input type="checkbox"/> Establish Consultative Approach	<input type="checkbox"/> Align on Financial Distress / Needs	<input type="checkbox"/> <input type="checkbox"/> Establish credibility Identify appropriate solution	<input type="checkbox"/> Buy-in on debt resolution as the personalized solution	<input type="checkbox"/> Customer understands next steps in the process
CONTENT 	1. Establish Role 2. Set the Agenda	3. Consultation 4. Discovery inc, Mini CFA	5. Review 5 Options  	6. Full CFA 7. Identify & Overcome Objections (Why over What)	8. Next Steps
EXAMPLES 	<ul style="list-style-type: none"> <li>Active listening: Sound engaged, interested, in the moment with your prospect.</li> <li>Offer a number of different solutions for consumers who want to pay off debt.</li> <li>My job as a Certified Debt Consultant is to ask you a few questions, better understand your situation and your goals, and provide you with options to achieve those goals.</li> </ul>	<ul style="list-style-type: none"> <li>What led up to your current situation? (PAST)</li> <li>How is your current situation impacting you? (PRESENT)</li> <li>What are you looking to accomplish in the next 3-5 years? (FUTURE)</li> <li>Determine monthly deposit ability by quickly assessing cash flow.</li> <li>Review credit report to determine Financial Distress.</li> </ul>	<ul style="list-style-type: none"> <li>Educate on other options based on learnings from Discovery</li> <li>5 Options DIY Consolidation Loan CCCS Debt Resolution Bankruptcy</li> <li>Explain benefits of debt resolution and how program works.</li> </ul>	<ul style="list-style-type: none"> <li>Run CFA to confirm monthly deposit suitability.</li> <li>Refer back to what you learned about the prospect's Financial Distress and Goals.</li> </ul>	<ul style="list-style-type: none"> <li>File review turn times and process.</li> <li>Electronic enrollment expectations.</li> <li>Set firm appointment for next interaction.</li> </ul>