



How Do I Get An Appointment?

The 3-Step, 3-Minute Phone Call

You can make a prospecting call in only 3 minutes if you discuss benefits instead of features. This way you will get more appointments without beating yourself up trying to sell over the phone — a difficult task with financial services. Focus on the benefits the customer could receive from coming in to see you. Remember, your goal is to get an appointment, not talk about products. Here is a typical 3-Step, 3-Minute Phone Call.

STEP

1

Purpose of Call **Ask for Appointment**

“Hello Mrs. Jones, this is Tom Whataguy at ABC Bank. I represent the XYZ Agency. One of my responsibilities is to meet with bank customers like you to discover ways to reduce your taxes or increase your monthly income. When would be the most convenient time for us to meet, in the morning or in the afternoon?”

Objections:

“How can you reduce my taxes?”
“How can my monthly income be increased?”
“Tell me more about it...”

Discuss benefits NOT products.

STEP

2

Purpose of Call **Ask for Appointment**

“Until I get to know more about you and your financial needs, it would be unfair of me to suggest something for you. I would like to meet with you here in the branch to find out how we can reduce your taxes or increase your monthly income. Would Thursday or Friday be better for you to meet?”

Objections:

“I’ve already got a broker.”
“Can you send me something in the mail?”

If you get an appointment, great!
If you get another objection, same response.

STEP

3

Purpose of Call **Ask for Appointment**

“Until I can find out what is important to you personally, I wouldn’t know what to send. If you can take ten minutes to meet with me here in the branch, we can quickly determine how I can help you reduce your taxes or increase your monthly income. Are mornings or afternoons more convenient for you?”

CONGRATULATIONS!

You have completed the third step. If you still don’t have an appointment, politely ask the customer if you can add their name to a mailing list for an upcoming seminar on tax savings. If they don’t want to be invited to a seminar, thank them for their time and say “Goodbye.” Now you are ready to make another call.

3 Outcomes from the 3-step Phone Call

1. **Appointment:** Congratulations!
2. **Invitation List:** For seminar or workshop
3. **Goodbye:** You can’t win them all!