1st Appt. Rebranding Booking Script

Step 2

*This is the booking script used for setting up the 1st Appointment with existing clients.*

*We recommend this appointment is booked 2 weeks out to ensure the client has enough time to receive the 1st Appointment Letter & Checklist and gather up any items requested. The sample below represents the Assistant making the call. It’s recommended this call is preceded by a call from the Advisor ahead of time to set the stage for the rebranding process. For more details, refer to the 1st Appointment Pre-Booking Call.*

* [Client's Name] please? This is [Assistant] calling from [Advisor's] office.
* I understand you recently spoke with [Advisor] about a few things we’ll be doing in your next meeting involving some recent updates we’ll be sharing with you.
* Today I’m calling to arrange that appointment with [Advisor].
* As [Advisor] mentioned, one of the things we are going to do is completely update your financial situation to ensure all the information we have for you is current and up to date.
* Prior to the meeting and to ensure that we have your most up-to-date financial information, I just wanted to let you know that we will be sending you a letter to confirm the meeting, including a checklist of items we will need you to bring with you.
* Do you have any questions?
  + *If YES, and you can answer the question, do so.*
  + *If you sense they are unsure, or they ask why you need more information, or you cannot answer the question, suggest booking a phone call with [Advisor] so they can explain further.)*
* We expect this appointment will take about one hour of your time. Is there a time that’s convenient to you during the week of [month-day]? Great, so we’ve got you down for [month, date, time].
* One final thing; [Advisor] probably mentioned that we’ve recently developed an Introduction Kit that describes our practice. You can expect to receive the Introduction Kit within the next week.
* Great.
* Thank you for your time and we look forward to seeing you on [date and time].
* Good-bye.