1st Appointment Booking Script

Step 4

*This script is used to book the 1st Appointment with a prospective client. This call should be made two days after the Introduction Kit has been received by a prospective client. The script is written to reflect the Assistant making the call, but it can be easily amended if made by the Advisor.*

* May I speak with [Prospective Client's Name] please?
* [Prospective Client's Name]?
* Thank you, [Prospective Client's Name], this is [Assistant] calling from [Advisor]'s office.
* The reason I am calling is to follow up on the *Introduction Kit* we sent you and to book your first appointment with [Advisor].
* First, I’d like to confirm that you have received the Introduction Kit.
  + *If yes* – continue with this script.
  + *If no* – schedule a follow up call in two days.
* Great - this kit provides you with some preliminary information about our practice and approach.
* Next, I’d like to go ahead and set up the first appointment, which will be approximately 45 minutes. As [Advisor] explained, this is an opportunity for both sides to get to know each other.
* I’m looking at the week of the [date]. Are you available at [day] at [time]?

*The 1st Appointment needs to be booked 2 weeks out to ensure we can implement the remaining Pre-Appointment steps, as well as, to set a pattern of reasonable notice for booking future appointments should they become a client and to reinforce scarcity (we don’t want to come off as needy and unprofessional).*

* Or is there something else that might work better for you that week? If so, we can have a look to see if that will work for us on our end.

*Book their appointment accordingly.*

* Thank you for your time [Prospective Client].
* We look forward to meeting you on [date and time].