

APPOINTMENT SETTING

Rev. 4/11/18

Fast Start – Setting Appointments with Ian Prukner – AUDIO 23 minutes
Fast Start – Appointment Setting Start to Finish 2017 with Ian Prukner – AUDIO 44 minutes

Always done on the phone. You control the situation.

An appointment is a time, date and place to give someone a presentation on our products and services or opportunity.

You should be setting 7 out of 10 appointments, or you're not good enough yet.

Nothing bad is going to happen to them at the appointment. They are going to take advantage of our products and services and change their life financially. Or, they are going to learn a lot.

Be sure to set the right kind of appointment: If they are 4 or 5 pointers, married with kids, lead with the KT appointments. 3 or less not married, no kids, recruiting appointment.

- Our business is just like going to school, you have to learn the things to make you successful in your chosen field first. The good news is it is not going to take you 4-5 years and with us you won't have any student loans. In fact, you can earn while you are learning.
- Without setting appointments you can't help anyone including yourself. You must be in front of the potential client or recruit, face to face, in order to help them and yourself.
- Everyone needs us more than we need them. Most people are not financially independent. The worst thing that could happen is they get a great education in money and finance and learn about things that can help them.
- Convinced people convince people. Be positive when setting the appointment. Assume they want to get together with you. They want your service, help etc.
- On the phone you can only do one thing...set an appointment.
- Don't let them "call you back," set the appointment. They are NOT going to call you back.

Mechanics of Setting an Appointment:

1. **Introduction** – Small Talk 10-15 seconds
2. **Linker** – The reason I am calling is,
3. **Body** –
 - a. (Hot market) Small talk. Listen, the reason I am calling, I am not sure if I mentioned to you the last time we talked, but I have got some financial licensing. I want to set a time to pop by and show you and _____ what I'm doing, so if you or someone you know in the future could use what I do. I would love for you to know enough to feel comfortable referring me. As far as us getting together, what's better for you? Weekends or weekdays? Once you are there on the appointment add, "I want you to know that this is what I've decided on to be my career."
 - b. (Warm Market) Small talk. The reason for the call is, I'm not sure if I told you this, but I've picked up a second job/financial licensing and things are going really well. Basically, the same as (A).
 - c. Hey, ____, this is _____. Small talk, the reason for my call is I've picked up a second job and things are going really well. I'm not sure if you would be interested in any extra work right now, but the company I am working for is looking to bring on some people. I want to schedule a time for you to come into the office. I'd like to introduce you to the guy I'm working with. And, listen, if you're not interested I know you will know some people who could potentially be interested in some extra work. I've got some openings on ____ and _____. When could I schedule you to come by. I really want you to take a look at this.
 - d. Hey, ____, this is _____. It was good meeting you the other day. The purpose for my call is I'm not sure if you are open to looking at any extra work right now, but the company I work for is hiring and you seem like a sharp person. I'd like to set up a time to get together with you and show you what I do, what my company is looking for. How we pay people. If you are impressed I'd like to pick your brain a little bit and see who you might know who could be a good fit for us. As far as us getting together, what's better for you....

4. **Closing the appointment.** "So, as far as us getting together, what's better for you, weekends or week days?"
5. **Post close** – "I've got you and your spouse down for _____. Unless something dire happens between now and then (like one of us dies) I'll see you _____. *(There is no need to call to confirm, but if something comes up please let me know.)*

HOT MARKET PERSON– someone you know well enough to go into their refrigerator.

WARM MARKET PERSON – someone you know, a casual friend.

OBJECTIONS – a request for more information

1. What is it?

Man, I'm really really glad you asked me that. I basically help people save money on taxes, on insurance, on debt and help them take that money and save it for their future. So, what's better for you, weekend or week-days...

2. What company is it?

I'm glad you asked me that. The Company is Primerica Financial Services. It's going really well. What's best for you....

3. I'm not sure, let me check with or let me call you back.

I appreciate that. I want you to _____, but why don't we do this. Typically speaking, what's better for you, weekends or weekdays? Pencil me in for _____. If that doesn't work call me back with a time that works better for you. So, unless one of us dies I'll see you and _____ on _____at _____.

4. I'm not interested.

(They don't know what they are not interested in.) I really appreciate that. I didn't know if you'd have any interest in this or not, but like I said, it would be great for you to know what I do so you could refer me to other people. So what's best for you....