

THE 8-STEP COMPELLING PHONE PROCESS

Step	Script
Step #1: Introduction	Hi, Name, it's
Step #2: Stop Sign	Don't say anything until the prospect speaks
Step #3: Ask Permission	You are probably busy and I am guessing you were not expecting my call. Is it OK if I take 10 seconds and tell you why I reached out to you?
Step #4: The Positioning Statement	Example: I am working with Presidents & Business Owners who are asking questions about how they are going to reach their growth goals in the current environment. Your Statement:
Step #5: Ask Permission	May I ask you a question?
Step #6: Give Two Examples	The two most common frustrations that area business owners are voicing are 1) concerns around access to capital and 2) turnover of their RMs. I'm curious, which is a concern for you? Your Examples:
Step #7: Discussion & Drill Down	Tell me more about that. - When did you first notice it was happening? - What have you done about it? - How big of a problem is that for you? - How do you plan to fix it? - How long can you allow that trend to continue? - Sounds like a problem. - Do you want to fix it?
Step #8: Close for the Appointment	Can I make a suggestion? Invite me out to your office (or let's find a time to meet). You can ask me some questions and I will ask you some questions about the problems you are facing. When we are done, we will both know whether or not it makes sense to take any additional steps. When