



Prospecting As A Habit

Initial Contact

(Creating Interest)

Silent

(Purpose: establish rapport)

SMILE

Say "Hello."

Interact with the associate... shake hands and introduce yourself.
(remember their name)



Call Back

Hi _____, my name is _____, how are you today?
(WFA)

(I / A friend of mine / my spouse) was in your store the other day... you helped (me/them) with....

You were very helpful and I wanted to compliment you...you don't find that a whole lot now-a-days...
(wait for answer)

The second reason I'm calling is, we're in the process of expanding an office locally, and I thought that you might be the type of person we're looking for... so I was calling to ask if you ever kept your options open?

(if they're stunned)
...or are you married to your job?

Great! (__NAME__) obviously, I can't promise anything, and I know you're at work, so what's the best way to get in touch with you outside of work?

Alright <NAME>, I'm looking forward to getting to know you better, I'll call you in the next few days and we can talk more about it... maybe even setup a time to meet... take care! ☺

Step 2: Mini Interview or 1-1 Interview

Direct

(Purpose: get phone number)

Strike up a conversation by asking a basic question.

- "...excuse me, can I ask you a question? ...do you live in this area?" (smile)
- "...the reason I'm asking is, you look like a sharp person, and we're expanding an office in the area, and we're looking to hire a couple people part-time, for around \$2,000/mo, who do you know that's sharp, like yourself, that might be interested?" (wait for answer)
- "...matter of fact, do you ever keep your options open yourself?" (WFA)
- Introduce yourself
- "here's my number.... I can't promise anything, but give me a call and we'll setup a time to meet, and see if we have a mutual interest."
- "by the way.... what's the best way to keep in touch with you?" (take number)
- "Thanks _____, I'll look forward to hearing from you soon, take care, ok?" (smile, and shake hands)

Handling "What do you do?"

- We teach people how to make and save money for retirement...but we're not looking for experience, we're mainly looking for good-honest people, who like helping others... do you like working with people?

Step 2: Mini Interview or 1-1 Interview



Mini Interview

Begin by building rapport...brief conversation, Ask them these questions and get to know them on a personal level.

1. *How long have you worked for ____? (if you don't already know)*
 2. *What do you like best about your job?*
 3. *If you could, what would you like to change about your job?*
 4. *How long have you lived in the area?*
- *Great... as I mentioned before we do financial services, but we're not looking for experience...we're looking for good-honest people who are motivated... do you like the topic of money and finances?*

The Invite

Great...BASED ON OUR CONVERSATION...

- *I WOULD like meet with you to discuss the possibilities...and if you are anything like me, you probably want to get all facts before you make a decision, right? (WFA)*
- *Of course we need to know more about you before we make a decision to bring you on board, so could you make yourself available this _____ night or would _____ be better? (WFA)*
- *Great, my vice president is doing a webinar on Zoom, and I can get you in front of him.*
- *It's the best way for you to see exactly what we do, before we see if you qualify, does that make sense? (WFA)*
- *I'll text you the link for the registration, go ahead and get registered right after we hang up, so can I tell my vice president about you.*
- *If anything changes and you can't make it, make sure you call or text me, so you don't get disqualified. Fair enough?*
- *When you sign in, have your camera on, and a notebook ready – I'll be on as well. Thanks again for your time, and I'll be looking for you text about the registration in the next 5-10 min, ok?*