GET THE APPOINTMENT:
A Step-By-Step Script

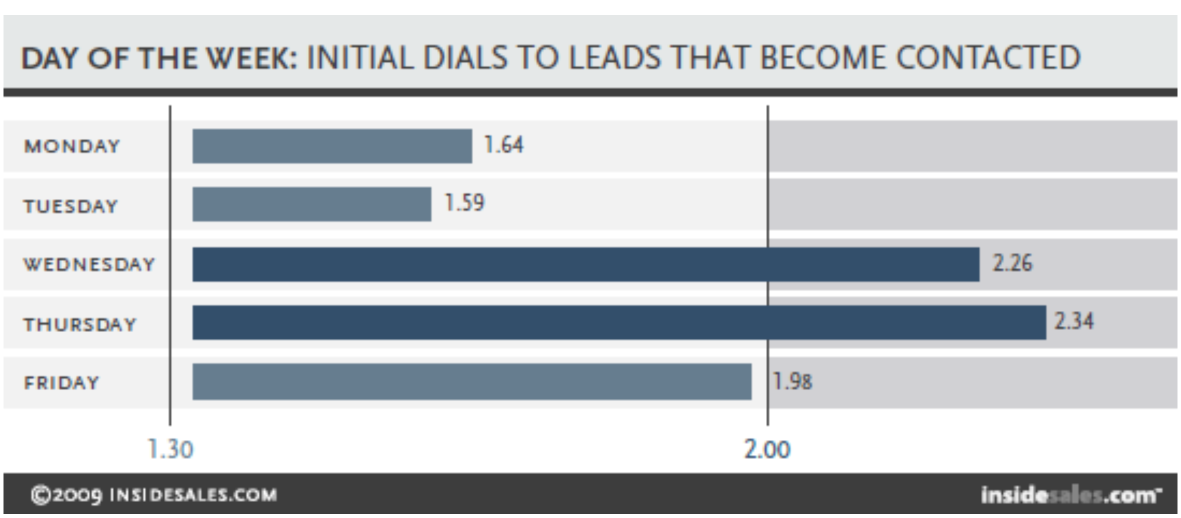
WEALTH INTEGRITY NETWORK GROUP

WHEN TO CALL YOUR LEADS:

The following is based on an independent study done over a 3 year period, provided by Lead Response Management.

DAY AND TIME OF WEEK

1. **Wednesdays** and **Thursdays** are the best days to **call** in order to contact (by **49.7%** over the worst day) and qualify (by **24.9%** over the worst day) leads. **Thursday** is the best day to contact a lead in order to qualify that lead (by **19.1%** better than the worst day).
2. **4 to 6pm** is the best time to call to make **contact** with a lead (by **114%** over the worst time block). **8-9am** and **4-5pm** are the best times to call to **qualify** a lead (by **164%** better 1-2pm, the worst time of the day). **4-5pm** is the best time to contact a lead to **qualify** over 11-12am by **109%**).
3. The odds of calling to contact a lead decrease by over **10 times** in the 1st hour. The odds of calling to **qualify** a lead decrease by over **6 times** in the 1st hour. After **20 hours** every additional dial your salespeople make actually hurts your ability to make contact to qualify a lead.
4. 4. The odds of contacting a lead if called in **5 minutes** versus **30 minutes** drop **100 times**. The odds of qualifying a lead if called in **5 minutes** versus **30 minutes** drop **21 times**.



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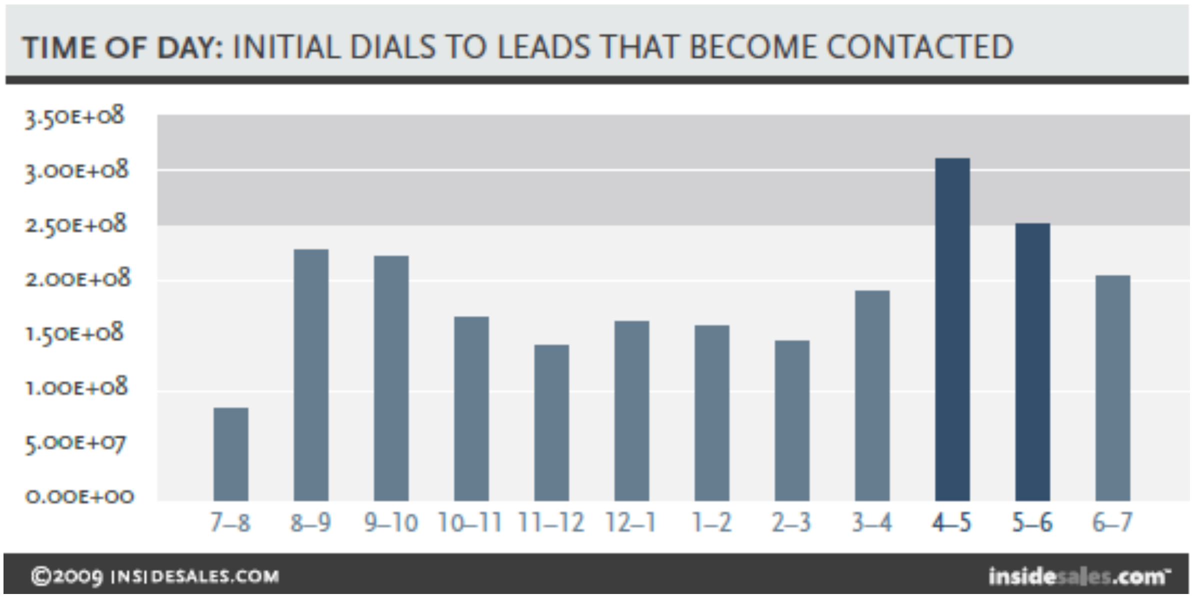

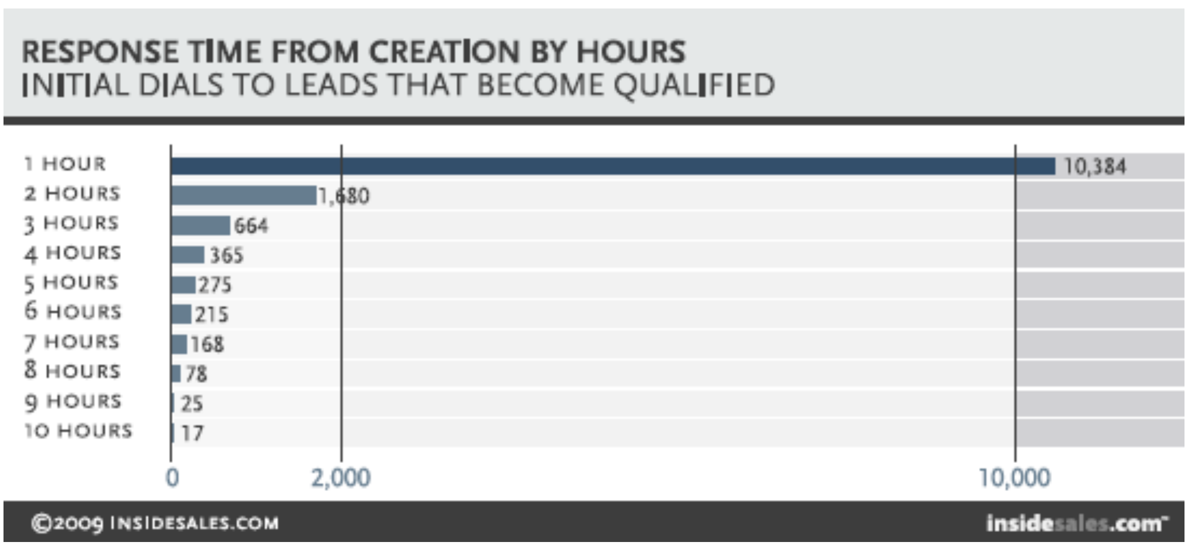

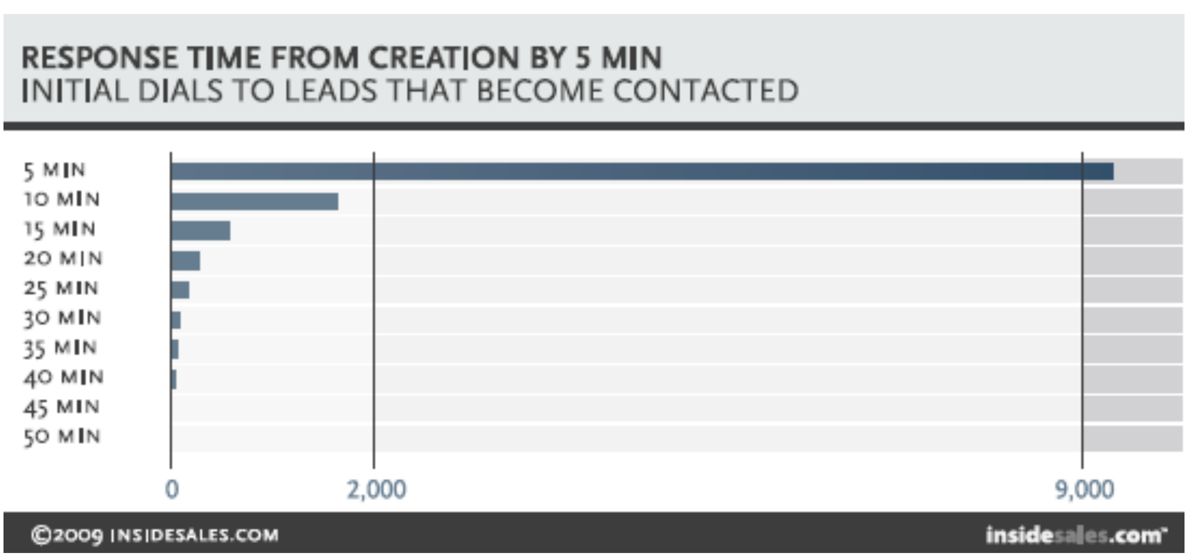

DO YOURSELF A FAVOR: GET AN ANSWER, GOOD, BAD, OR UGLY

When you are working your leads draw everything to a conclusion.

- Call your leads until they answer. A lead is never too old. Remember, they CALLED YOU.
- When you talk to your lead draw the conversation to one of three closes:
- Book an appointment at a specific day and time.
- Book a callback at a specific day and time. (1 time only)
- Put the lead in a drip system

APPOINTMENT SETTING SCRIPT

A = Appointment Setter or Agent

P = Prospects

( ) = customized info

INTRODUCTION

A: Good ______________ (morning, afternoon, evening) **is** __________________ (first name of prospects) **available?**

A: Great! My name is _____________ (your name) **with** ___________ (your company name) **and I'm responding to your request that was made from** _____________________ (source of lead: name of radio station/ direct mail invite/tv ad/online ad) **for the** _____________________________ (call to action piece)

PERMISSION TO CONTINUE CONVERSATION

A: Is this good time to connect for a few minutes or is there a better time to call later today or tomorrow?

P: Sorry caught me in the middle of something....

A: No worries, my schedule is open tomorrow __________________ **or the next day around** __________________**, this will be just a short 10-minute follow-up phone call for the request you made. What time works best for you?**

P: I have some time...

(good time to chat)

A: Perfect! (repeat the reason for the call) **Glad we can connect, again...the reason for my call is...**

BIGGEST RETIREMENT CONCERN QUESTION

A: QUESTION #1 Most of the clients we work with that respond for the _______________(call to action piece) **are concerned about their financials and how it affects their retirement... when it comes to your retirement plan, what is your biggest concern...**

- **Income?**
- **Too much exposure to market volatility?**
- **Guaranteed protection of your retirement savings?**
- **Or all of the above?**

A: Thank for your response...a lot of the clients we help feel exactly the same and is a huge reason why they work with us.

OPEN-END QUESTION

A: Question #2 In addition to your concerns, what other specific topic or other financial concern questions related to retirement did you have?

YOUR UNIQUE BACKGROUND AND COMPANY STORY

A: Great feedback…. We have helped many clients with the same questions and concerns...a little bit about ourselves and how we help provide solutions/answers to clients who are in the same exact position.

____
____
____
____
__ (this is where you highlight your background, how being independent seperates you from other advisors, share your experience and tie that into the unique approach, solution, or back to the call-to-action piece and how it will help them solve some of those questions)

EXAMPLE BELOW:

Now we are an independent firm that together with our partners last year protected 764 million dollars against market loss, not one of our thousands of clients across the country has ever lost a dime, nor paid a fee to us for money management using our ____(safe money/no-risk account/ or your unique sales approach method)

We have access to the entire spectrum of financial and insurance backed accounts, so we can provide whatever we want....

Most financial advisors want to put your hard earned money in the world's largest casino-the stock market-and then charge you multiple fees to play dealer.

Our firm has made a name for itself by choosing to work exclusively with accounts that guarantee the safety of your deposit from day one, grow your money without the risk of market loss, and guarantee a retirement income that you and your spouse will be able to rely on for the rest of your lives.

VERIFY THEIR UNDERSTANDING

A: _____________ (first name of client) **Does that make sense what our company specializes in and how we help prospects like yourself that are concerned about** ____________________ (losing money/outliving their income/protecting their retirement account, etc)?

POTENTIAL ASSETS QUESTION

A: To make sure we are on the same page with your financial retirement goals and how we marry that to the right strategic retirement plan…. I will ask a question about what you've put aside for retirement.

Not including your home or real estate, would you say that the combined value of your savings, investments, and retirement assets; things like IRAs, 401(k), CDs, mutual funds, and brokerage accounts is greater or less than $200k?

A: Thanks for your feedback, I appreciate what every hard earned dollar means to your retirement, as we recall what happened in the DOT.COM bubble and REAL ESTATE bubble,

a lot of our clients that lost a TON of money during the DARK AGES of market...we've helped recover and gain back some or most of those losses

...the great news is, these alternatives options are available to you, where these programs can protection 100% of your deposit and all the earned interest…

IF you see a benefit in learning more about how we might be able to help you in the same way...I'd love to spend a few minutes with you face-to-face to cover these options.

THE APPOINTMENT SET-UP

A: Because of book of clients we service, we are only accepting a few new clients each month, where we schedule an introductory consultation where I can show you some of the unique retirement and financial planning strategies that have helped protect over $____ million last year (quote whatever you sold in annuity sales last year OR quote annual sales of fixed annuities industry wide)

A: I have some time on ____________ (date) **or ______________**(date) **in the _________________** (morning, afternoon, evening) **which works best for you?**
(always offer at LEAST 2 appointment time options)

GOOD LUCK! WE WOULD LOVE TO HEAR YOUR FEEDBACK ON WHAT'S WORKING, WHAT ISN'T AND ANY SUGGESTIONS WE SHOULD MAKE TO REVISE THE SCRIPT AND MAKE IT EVEN BETTER.

WIN MARKETING TEAM

(888) 244-5764 EXT. 200