

## Phoning Language

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*Like all of the language you work to master, your phoning language is more for YOU than it is for your prospective client. It gives you a track to run on. When you know your language exceptionally well, you are infused with a ton of confidence. This allows you to focus your attention on your tone, your inflection – so that the person on the other end of the phone feels as though you are reaching through to grab them and get their attention because you are so passionate about what you do!*

*Always finish by offering two days/times to meet. The psychology of this tactic is that the prospective client is not objecting to meeting with you, but rather to the day/time you offered. It also reinforces your end goal – which is simply to book the appointment. Because the phone is simply a gateway to get in front of them – and you know that if you can meet them, there is a high degree of certainty that you can change their life financially.*

Hey Tim, it's Jim Effner from XYZ Company. How are you doing today?  
I don't know if Mary Smith [Referror] had the opportunity to tell you that  
I'd be calling...hopefully she did!

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Now that I've got you on the phone, let me tell you the reason for my call.  
I am with XYZ Company, in the financial planning business. Mary had no  
reason to assume that you'd be interested, but knowing both of us, she  
thought a meeting between the two of us would serve to our mutual  
benefit. I am calling simply to set that up.

I understand you are in the IBM building – I'm going to be in your building  
next week Tuesday. Would 10:00 or 2:00 be better for you?

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## Clarifying Questions

### ***What is it that you do?***

As I mentioned I'm in the financial planning business, but once again – Mary was not assuming that you would be interested; however, she insisted that a meeting between the two of us would be mutually beneficial. As I mentioned, I am going to be in the IBM Building next week Tuesday – would 10:00 or 2:00 be better for you?

### ***Could you send me some information?***

There are a ton of things I could send you – but at this point, I would have no idea what to send you. Once again, Mary was not assuming that you had a need, but she felt strongly that a meeting between us would be mutually beneficial. I am going to be in the IBM Building next week Tuesday – would 10:00 or 2:00 be better for you?

## Objections

### ***No thanks, I'm busy.***

I can understand and appreciate that. ALL of my clients are busy! Once again, Mary did not assume that you would be interested, but she felt strongly that the two of us meeting would be mutually beneficial. As I mentioned, I am going to be in your building next week Tuesday, and also next Friday – which of those two days is better for you?

### ***I already have a financial advisor.***

I would be shocked if you didn't already have an advisor – given the caliber of individual you are, based on what Mary had to say about you, I would fully expect that you are working with someone. Let me share my experience. When we meet, one of two things will happen. First – I give you affirmation that the person you work with is doing a great job; you have every "i" dotted and every "t" crossed. And if that happens, you will feel even that much better about the person you are working with. The second thing that could happen is that I could uncover some areas that the person you are working with did not have the opportunity to think through, and if that happens – they are really glad they met me. Given that, would Friday at 9:00 or 1:00 be better for you?

### ***I'm all set.***

I can totally understand and appreciate that. As you can imagine, a number of my clients felt that way when I first reached out to them. However, once again – Mary didn't assume you would be interested, but she insisted that a meeting between us would be to our mutual benefit. And in that meeting, one of two things will happen. You get further confirmation that you truly are all set – and given something as important as financial planning, it makes you feel that much better about your situation. The second thing that could happen is that I could uncover some areas that you were just not totally privy to, and if that happens – most people are very glad they met me because they would have never been aware of those things. The way I look at that – either one of those is a positive outcome. As I mentioned, I am going to be in your building next week Tuesday, but if that day isn't good for you, I am also there next Friday. Would 9:00 or 1:00 be better for you?