

# Prospecting Process Templates

## Discovery Meeting

### Appointment Setting Call Script:

Hello, may I speak to [Prospect's First Name(s)]? This is [Your Full Name] calling from [Practice Name]. [Advisor's First Name] asked me to call you to set up a time for you to come in to review the profile you recently returned to us.

We're currently setting appointments during the week of [Month and Date]. Is there a time of day or day of the week that works best for you? (Work with the client to find a suitable time that fits within the advisor's preferred schedule. Give client a specific date and time as a suggestion.) Does Monday, the 13th, at 11:00 work for you?

I will send you an email confirming the appointment. It will contain a list of what you should bring with you to the appointment. What is your email address?

Great. We'll see you Monday, the 13th, at 11:00. We look forward to the meeting. If you have any questions beforehand or need to reschedule, please call me at [Your Direct Line] or [Your toll-free direct line].

### Appointment Setting Call Script:

**Subject Line:** Appointment Confirmation

**Text Body:**

[Dear Prospect's Name],

This is confirmation that you have an appointment with [Advisor's Name] on [Date and Time]. Our office is located at [Office Address].

If you have a specific topic you would like to discuss during your appointment, please notify us as soon as possible by calling [Team Member's Name and Phone Number].

Please email [Advisor's Email] with questions.

We look forward to your appointment.

For more information on [Company Name], please visit us at [Company Website].

Thank You!

[Company Name]

## Appointment Reminder Email Text:

**Subject:** Appointment Reminder

This is a reminder that you have an appointment with [Advisor's Name] on [Date and Time]. Or office address is: [Office Address].

If you need to reschedule or have a specific topic you would like to discuss during your appointment, please notify us as soon as possible by emailing or calling

[Team Member's Name, email and Phone Number].

We look forward to your appointment.

For more information on [Company Name], please visit us at [Company Website].

Thank You!

[Company Name]

## Discovery Meeting Follow-up Email Text: (Note: Schedule the Proposal Presentation during the Discovery meeting)

**Subject:** Planning Discovery meeting follow-up

Dear [Prospect's Name],

I enjoyed meeting with you on [Meeting Date] and would like to review the topics we covered:

Points of Discussion:

- » [Insert Points of Discussion]
- » [Insert Points of Discussion]
- » [Insert Points of Discussion]

Please let me know if any of the above items are incorrect or if there is anything you feel we missed.

We look forward to seeing you on [Date of next meeting] to review your plan and solutions.

If you have any other questions, please feel free to contact me either by email at [Email Address] or by phone at [Phone Number].

Sincerely,

[Advisor's Name]

[Advisor's Title]

# Proposal Meeting

## Proposal Meeting Reminder Email text:

**Subject:** Appointment Reminder

**Text Body:**

REMINDER!

You have an appointment with [Advisor's Name] on [Date and Time]. As a reminder, our office address is: [Office Address].

If you need to reschedule or have a specific topic you would like to discuss during your appointment, please notify us as soon as possible by emailing or calling

[Team Member's Name, email and Phone Number].

Please email [Advisor's Email] with questions.

We look forward to seeing you again.

Thank You!

[Company Name]

[Company Website]

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## Notes about Virtual Meetings

There are a few changes you should consider making to the scripts if the meeting is being held virtually.

- » Ask if the client is familiar with the video conferencing tool you will be using; if they are not be sure to send them a link to instructions and offer to call them in advance of the meeting. Have someone in the office start the meeting and trouble shoot in advance of the meeting so that the meeting with the advisor can start promptly.
- » For clients that are not as comfortable with technology and you are experiencing audio issues offer to call them directly.
- » If you typically have clients bring documents to the meeting, instruct them on the best way to provide those documents to you before the meeting.

## Virtual Meeting Examples:

### Discovery Meeting

#### Virtual Appointment Setting Call Script:

Hello, may I speak to [Prospect's First Name(s)]? This is [Your Full Name] calling from [Company Name]. [Advisor's First Name] asked me to call you to set up a time for you to come in to review the profile you recently returned to us.

We're currently setting virtual appointments during the week of [Month and Date]. Is there a time of day or day of the week that works best for you? *(Work with the client to find a suitable time that fits within the advisor's preferred schedule. Give client a specific date and time as a suggestion.)* Does Monday, the 13th, at 11:00 work for you?

I will send you an email confirming the virtual appointment. We use [web conference software], have you used that specific web conference software tool before?

**If Yes:** Great, are you comfortable with it, or would you like us to send you instructions on how to use the program? *(If no, send instructions as you would if they have not used the software and also offer to call in advance to get them setup.)*

**If No:** OK, we will send you some instructions and we can logon 5-10 minutes before the meeting to make sure you are comfortable with the technology. We will include this information in the confirmation email.

The email will contain a list of what you should have available during the appointment. What is your email address?

Great. You are scheduled for Monday, the 13th, at 11:00. We look forward to the meeting. If you have any questions beforehand or need to reschedule, please call me at [Your Direct Line] or [Your toll-free direct line].

#### Virtual Appointment Confirmation Email Text

**Subject Line:** Appointment Confirmation

**Text Body:**

[Dear Prospect's Name],

This is confirmation that you have an appointment with [Advisor's Name] on [Date and Time]. Here is the link to join the virtual meeting [Meeting info / Address]. *(if needed)* We have included some instructions on using [web conference software] and we will be available 10 minutes before the call to make sure you are setup and the technology is working as it should.

If you have a specific topic you would like to discuss during your appointment, please notify us as soon as possible by calling [Team Member's Name and Phone Number].

Please email [Advisor's Email] with questions.

We look forward to your appointment.

For more information on [Company Name], please visit us at [Company Website].

Thank You!

[Company Name]

## Virtual Appointment Reminder Email Text:

**Subject:** Appointment Reminder

**Text Body:**

This is a reminder that you have an appointment with [Advisor's Name] on [Date and Time]. Here is the link to join the virtual meeting [Meeting info / Address]. *(if needed)* We have included some instructions on using [web conference software] and we will be available 10 minutes before the call to make sure you are setup and the technology is working as it should.

If you need to reschedule or have a specific topic you would like to discuss during your appointment, please notify us as soon as possible by emailing or calling [Team Member's Name, email and Phone Number].

We look forward to your appointment.

For more information about [Company Name], please visit us at [Company Website].

Thank You!

[Company Name]



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