

First call script: what to say to secure your initial meeting

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Saying the right thing is essential to securing your first meeting with a lead. Follow this script to mirror the experts and nail your first call with your enquiry.

Introduce yourself

Hi [enquiry's name], this is [your name] from [your company]. I got your details from Unbiased.

Thank you for submitting an enquiry earlier. Is this a good time to chat?

If the enquiry says no, confirm a time and date for a callback.

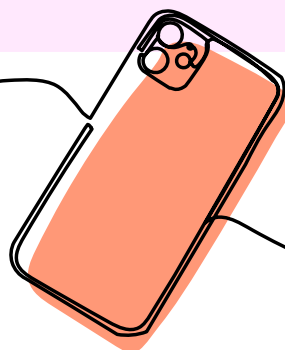
Instill confidence and make your lead feel comfortable

In your enquiry, you mentioned you're looking for [enquiry's advice query], is this correct?

Allow the enquiry to elaborate on their query and what they're looking for.

I understand. Don't worry; this is a common question many people have. We've worked with multiple people on [repeat the issue back to the enquiry], so we have a solid understanding of what's involved.

If possible, elaborate further on you or your company's expertise in the related field, including credentials. An example of work with a previous client works well here.



Answer their questions

I understand reaching out for financial advice can sometimes be a bit daunting, but I want to assure you we will do what we can to help you with [repeat the enquiry's issue] and [highlight the value of having this issue resolved].

Do you have any questions for me? I'm happy to answer any questions you might have.

Answer the questions posed by the enquiry, ensuring that you remain personable throughout.

Gently requalify their information

I'm just looking at the information you submitted through Unbiased here; is it ok if I confirm a few details with you?

Requalify their information.

Tell them about the next steps

Perfect, thank you for that.

The next steps would be for us to schedule a first meeting where we can talk through [the enquiry's issue] in more detail and work to find a solution.

If you are not the adviser and are scheduling the meeting on behalf of someone else, make it clear who the enquiry will be speaking to during this meeting and their relevant experience.

This meeting is free of charge, and you have absolutely no obligation to proceed if you don't want to.

Are you happy to move forward with this?

Finish strong

Great. Should we schedule a meeting for [suggest date and time for a meeting]?

Find a date and time that works for your enquiry, be flexible and ensure to confirm a meeting.

We can do this [suggest meeting options, i.e., face-to-face (if so, include destination), video call, or phone call]. What would work best for you?

Great! A [confirmed meeting method] on [confirmed date and time] it is. I'm booking this now.

It was great talking to you today. I'll send over a summary of our conversation today and any information you should bring to our meeting in an email, so you have it all in one place.

In the meantime, if you have any questions, please feel free to call or email me; I'm here to help.

With these tried-and-tested tips, you can set yourself up for success and increase your likelihood of booking the first meeting with your enquiry.

