

RECRUITING REFERRAL CALL or Off Teammate's List (3-Good Qualities)



Trainer

Hello _____. Hi, this is *trainer's name*. I'm the supervisor over at WFG. I was actually referred to you by _____. Do you know _____? I was speaking with them and told him/her we are expanding, and I was looking for some sharp people and I was describing what I was looking for and he/she mentioned you. He/she said some great things about you, he/she said you were _____, _____, and _____. (3 *good qualities*)

I don't know too much about you, what exactly do you do?

Prospect: I work at....

Trainer:

Oh great!

Well again, I didn't know much about your background but from what _____ said about you I thought it made sense to give you a call. I would love to introduce our firm to you to show you who we are, what we do, and give you a chance to introduce yourself to us and see if there is a fit.

What is your schedule over there?

Prospect: I usually work (8-5, Monday – Friday.)

Trainer

(If 1on1) What's best for you, morning or afternoon?

Tuesday or Wednesday? 3 or 5?

(If BPM) Sounds like evenings and weekends would probably work best for you, right?

Prospect: Yes

Trainer: We usually see people in the morning, but let's see... well, I could probably get you in Wednesday evening or maybe Saturday morning. Would one of those work for you?

Prospect: I could probably come Wednesday.

Trainer: Okay great, do you have a pen?

Prospect: Yes. (or “let me get one”)

Trainer:

Okay, our address is ... (21300 Victory Blvd. Suite 120, Woodland Hills). This will be perfect since you don't know a lot about us. We are having some training and an overview of the company that night. This will give you a chance to see who we are and check us out. Then, if they like you, they'll invite you back for more of a one on one, so we can check you out and see if there's a fit. I'll put you down for 7pm, you can ask for me when you get here, and dress sharp – business attire is appropriate. You will be meeting the branch managers.

Let me give you my direct line in case of any problems. It's _____. Great! Well, I'm really looking forward to meeting you on _____.

If Questions:

What do you do?

We are a full-service brokerage firm. We work in all areas of financial services.... You probably have heard of our parent company, Transamerica. When we get together, we can go over who we are and what we do and really what we are looking for. Again, I'm not sure if we are right for you or if you are even right for us, but from what _____ said about you, I thought it makes sense we at least get together.

OR

Trainer

Hey _____. This is trainer name calling. We haven't had a chance to meet, but (trainee/client) passed your number along to me. He/she told me you're _____, _____, and _____. (3 good qualities).
Is that true?

“Sure, I guess”

Great, I'm expanding my business and looking for some good people. I just wanted to know, are you locked into what you do, or do you keep your options open?

“Options open”

Frequently asked questions

1. "I'm too busy."

I understand, I'm busy too. Why don't we do this; let's set a tentative time to get together and confirm it as we get closer? Would it be better later this week or next week?

2. "I already have a financial person/advisor."

- a. Okay, have you ever had a second opinion?

"Yes or no..."

Okay, let me ask you a question. If I could show you a way to put an extra 2, 3, maybe \$400,000 in your retirement account, wouldn't that at least be worth half an hour to take a look?

- b. That's great. I'm glad to hear that. We're not trying to replace all the things you're already doing, but what we've found is that we can usually compliment what someone already has in place. So, let's get together anyway, and if you see something you like, great, if not, no worries. You might still be able to send some good people my way. Does that make sense?

3. "Well before I meet, I'd like to know more, what exactly do you do?"

Basically, we help people get debt free, get on track for retirement, and set up their kid's education. Everyone wants to do that, right?

So what works better for you, _____ or _____?

4. "I've already sat down with someone from your company. I already know what you guys do."

So, are you a client or are you working with our company? (WFA)

A lot of people we've been able to help out had seen other presentations before ours. Typically, what they find is that we share additional information that they haven't seen before. We're all independent brokers; we all specialize in different areas. Based on the fact that you haven't seen it from me, I still think it makes sense we get together. So what works best for you _____ or _____?

5. "I've heard negative things about WFG."

What did you hear? *(WFA! Let them tell you what they've heard.)*

We work with major companies like Nationwide, Pacific Life, and Transamerica. You'd have to agree with me that those companies wouldn't partner with us if that stuff was true, would they?

Great, so what works best for you _____ or _____?

6. "Can you just send me some info? (Email, etc)"

I don't typically do that, because an email is not going to do it justice. There are things I need to show you visually and in person that an email can't do. So let's find a time to get together? What works better for you _____ or _____?

7. "Is this a pyramid or like one of those things?"

I appreciate your question, what's your definition of a pyramid? *(WFA!)*

Actually _____, from what I understand pyramids are illegal. We work with major companies like Nationwide, Pacific Life, and Transamerica. You'd have to agree those companies wouldn't partner with us if that were true, would they?

We have a similar model to a Real Estate brokerage, so when we get together I'll show you what we do, and we can go from there. Does that make sense? So, what's going to work better for you, _____ or _____?