

Cold Call Process

Management

- 1) Script
- 2) Call X Amount of clients
- 3) Evaluate Script Effectiveness
- 4) Revise as needed
- 5) Repeat

Caller

- 1) Call
- 2) Mail brochure (immediately after call)
- 3) "clarity call" – tool – not every time. Train were appropriate
- 4) Email Proposal
- 5) Follow up process
- 6) Revise quote
- 7) Book