Selling Reporting and Mentoring Services

Call Scripts - for greeting and opening conversations with your clients:

1. **Introduce yourself** in a loud and clear voice. **Allow a pause** for them to register who is calling.

    - Hi John, it's Danelle calling from Rocket Ship Accountants how are you?

2. An **icebreaker** - keep it about them, and be interested, take notes and add them to your CRM! Relationships are at the core of any advisory engagement.

    - Did you enjoy some R&R over the holidays?
    - How are things going at your end?
    - Are you looking forward to the break?
    - Thanks for all the information you have compiled for us

3. Set the scene and the **purpose** of the meeting. Ensure that you make the meeting time at a point where **all the key stakeholders** can attend, and also maximises your own time and efficiencies.

    Where possible try and make this at the **client location**. You should endeavour to **have one on site meeting** with your clients per year.

    Be mindful of having **other team members** join you so that you build wider relationships, and use face to face meetings as robust on the job training.

    - I was just calling as we have the Financial Statements ready to go, and it would be great to catch up and go through these. More importantly it would be good to look at the year ahead and understand what that looks like for you, and your goals and objectives.

    OR

    - I was just calling as I have been having a quick look at your numbers. It would be good to look at the year ahead and understand what that looks like for you, and your goals and objectives.

      It would be good to have Jim, and Sue attend the session also so that we are all on the same page.

      I am happy to come over to your offices. How are you placed on either Wednesday at 4pm or Friday at 9am?

4. Ensure you **provide sufficient time** for the client to review the information. Inform the client who you will be taking so that can have an appropriate sized space available.

   ALWAYS share the agenda and invite them to add to that in advance so that you can be aware of any key updates / aspects that may arise in the session.

   - Ok great, I'll send across the information for you to review in advance of our meeting. Please feel free to share any key updates with me in advance of the session also.
   - Jane from our office will also join as she has prepared much of the work.
   - The calendar invite and agenda will be hitting your inbox shortly - looking forward to catching up.