

APPOINTMENTS & EDUCATIONAL WORKSHOP

1ST APPOINTMENT CONFIRMATION PROCESS



1

NIGHT OF THE CLASS

***IF THE PARTICIPANT SCHEDULES APPOINTMENT**

Fill out the First Appointment document with appointment date & time.

First Appointment document will highlight documents to bring with the Analysis that they need to fill out prior to their appointment.

Attach office map.

2

MORNING AFTER CLASS

“Snail” mail a First Appointment letter and packet.

Include Analysis and office map.

Advisor to call those that did not set an appointment at class.

Advisor to call no shows & cancellations.

Enter evaluation results and review contact info in CRM.

3

THREE DAYS PRIOR TO APPOINTMENT

Email appointment reminder.
(template available)

Ask prospect to bring the 1st appointment packet documents.

**If email is unavailable, call to remind prospect of appointment.*

4

DAY BEFORE APPOINTMENT

Call to confirm appointment.

5

MORNING OF APPOINTMENT

Text message thru Infusionsoft or Keap.

**If texting is unavailable, skip step.*

