

PROJECT 100

Approaching Script

Project 100 – Telephone & Approaching Script

Telephone Script

A. From your namelist

Good Morning/ Afternoon, is that Mr. _____ I'm _____ from Great Vision. We are dealing with wealth preservation. We are running a Project in providing latest financial information & awareness to the public. We would like to get you informed on the latest development pertaining to wealth preservation. Perhaps it may be of benefit to you in the future or it may work well with your clients or friends.

Since I'll be serving my clients somewhere your place for the next couple of days, would it be alright to drop by and say hello to you? Would you prefer morning or afternoon session? Shall we meet at ...

您好！_____先生。我是来自 Great Vision 宏愿理财机构的_____ 我们专为个人与企业提供财富保值服务。一年一度我们都会个活动为客户与朋友提供财富管理的最新消息，所提供的资料也许对您或您的顾客朋友有所帮助。这样好吗？这几天我会到您公司附近见一些客户，时间允许的话我想亲自见您把资料交给您，同时让您了解详情。

Handling challenges

Never mind thank you, I don't think I need it.

Don't worry Mr. A. I am sure you will definitely had no idea what is it all about unless you get to know it. Why not, since I am going to visit some of my friends nearby your office, I will just pay a courtesy visit to you? Would you prefer morning or afternoon?

I sorry. I am too busy, can I call you some other time?

Sure. Maybe we can catch up some other time. But since I am going to visit some of my friends nearby your office, I will just pay a courtesy visit to you? Would you prefer morning or afternoon?

Are you selling me anything?

We are not selling anything unless there is a need arise. We would like to share with you some of the good ideas that may be of benefit to you. Why not, since I am going to visit some of my friends nearby your office, I will just pay a courtesy visit to you? Would you prefer morning or afternoon?

I already have a good planning for ...

That is very good. Glad to hear that you put these as your priority. Perhaps it is time to get a review or to get to know the existing program in the market for future enhancement and knowledge. Since I am going to visit some of my friends nearby your office, I will just pay a courtesy visit to you? Would you prefer morning or afternoon?

Maybe some other time, thanks

No problem. We can talk about this some other time. By the way, since I am going to visit some of my friends nearby your office, I will just pay a courtesy visit to you at least we get to know each other? Would you prefer morning or afternoon?

Thanks. Nevermind, thank you, nevermind, thank you.

You're most welcome. I believe in business networking and interaction for business enhancement. Since our company has a large database from various background and profession, I will appreciate if we could meet up to get to know each other better perhaps our clients may need your services in future. Why not, since I am going to visit some of my friends nearby your office, I will just pay a courtesy visit to you? Would you prefer morning or afternoon?

Face to Face

Good morning, Mr. A , this is my name card Finally we meet... (casual talk)
How is your business? What's the nature of your business? (etc...)

I am happy to share some information with you. Have you heard of Great Vision? We are dealing with personal and business wealth planning. Range from wealth protection & accumulation to preservation & distribution. As I mention earlier we are not here to sell you anything unless you have a needs.

Every beginning of the year, we are trying to get our clients updated with some of the latest information. Meanwhile we do help our clients and friends to do a quick review on their financial planning. By the way, what is your main concern now in terms of your wealth planning? We do have a simple checklist for our clients, why not we just take a glance on it...

Mr. A, there are many area to cover in terms of personal financial planning. Nevertheless, the most important aspect will be risk management. Here is some of the sharing that may be of benefit to you. (please refer to the IMM Booklet). Let's look at page...

你好，我是宏愿理财机构的 _____。(交换各名片及了解对方行业 or).

非常高兴能与你分享一些资讯。您有听过宏愿理财吗？我们专为个人和企业提供财富规划与管理。例如；财富保障，累积，保值及分配。我们纯粹是想与您分享财务规划最新的资讯，这也是我们一年一度为客户做财务检阅的活动之一。

谈到这里，请问您目前为自己或家人最担心的财富管理是什么？通常我们都有一些文件来协助客户思考这个问题，也许我们可以用很快的时间了解一下。

A 先生，个人风险规划是财富管理之中最重要的环节。这个小册子的资料也许对您有所帮助。就比如 ...

a. CI Upgrading

How much Critical Illness Coverage do you have?
Why? What if the amount is not sufficient, where does the money come from?
Do you know how much coverage it supposes to be?
If you were to save for your critical illness, how much would you like to set aside?

b. Retirement Planning

Have you planned for your retirement?
Have you saved for your retirement?
How do you plan for it?
How it works? Does it work?
How much do you need for retirement?
If you were to save for your retirement, how much would you able to set aside?

Note: Using CRM for the following:-

- Key in individual prospects into Leads
- Create a Campaign for Project 100
- Add in the Leads and Contacts
- Activity management via CRM
- Manage the outcome accordingly

PROSPECTING & MARKETING

***APPROACHING
SCRIPT***

Prospecting & Marketing Skill

1. Exchange of Name Card

Hello, are you working somewhere here?

I am Andy from Great Vision. How do I address you?

Jessie,...from? (wait for her to answer...)

By the way, this is my name card. (wait for her name card)

(if she doesn't give you her card, then...)

Can I have your card please?

(if she doesn't carry any)

Oh I see, no problem. I believe in networking and if you don't mind you can write down your contact. Who knows there may be a business opportunities in future. (Jessie right? What's your contact number / or your office contact.....)

We are dealing with personal, family and business financial planning. Don't worry, this is not so much on selling. I have something very interesting to share with you, I am rushing for an appointment. I owe you a presentation and I will call you later. Bye !

Hello, 您好！您在这儿办事吗？

我是 Andy 来自 Great Vision 宏愿理财。请问如何称呼呢？

哦！Jessie... 来自哪里呢？

这是我的名片。

我可以拿您的一张名片吗？

没问题。我总相信出外靠人脉，如果您不介意的话请把您的联络写下以便将来也许有预想不到的商机。

Jessie 是吗？电话是.....

我们是从事个人，家庭与企业的理财咨询服务，财务规划及企业培训服务。别担心，我不是要卖您什么。我有一个非常特别的东西想与您分享。这样好吗，我正在赶着另一个约会，就当着我欠着您一个呈现吧！我会在近期里联络您。Bye!

2. Telephone skill

a. For someone you call 2 to 3 days or within a week after you have taken the name card.

Hello, good morning, is that Jessie?

Do you have a moment to talk?

I am Andy from Great Vision. How do you do?

Remember me, we met somewhere at

I am so sorry the other day, I was too rush and couldn't share with you.

Jessie, for the next couple of days, I will be serving my clients somewhere your place. Would it be alright if I were to pay you a visit or say hello to you after my appointment?

(if answer Yes).

Would you prefer to meet up in the morning or afternoon?

Why not we set it tentatively on Friday 2pm at your office?

(if answer NO)

No problem. I think you must be very busy.

Since I will be there serving my clients, I will call you once I have completed my work.

See you, bye!

Hello, 早上好! 您是 Jessie 吗?

请问您方便讲话吗?

我是 Andy 来自宏愿理财。还记得我吗? 我们曾经在____见过面。

非常抱歉, 那天我实在太忙了。无法与你分享一些概念。

Jessie, 在近期里我会在您的附近做些服务, 如果时间允许的话也许我就过去拜访您。请问您比较喜欢在早上见客或下午见客?

那我们就暂定在星期五下午两点钟在您的办公室会面好吗?

(if answer NO)

没问题。相信您一定再忙着。

既然我已经在那儿活动, 办完事后我就摇个电话给您好了。

b. For someone you have forgotten to call after you have taken their name card.

Hello, good morning, is that Jessie?

Do you have a moment to talk?

I am Andy from Great Vision.

I think we should have met somewhere

I am in the midst of compiling my name cards and your name card just appear in front of me and

I just want to join back the missing link. How do you do anyway?

Are you with this company.....

Why not this way, if I come across to serve my clients somewhere your place,

Would it be alright if I were to pay you a visit or say hello to you after my appointment?

(if answer Yes).

Would you prefer to meet up in the morning or afternoon?

Why not we set it tentatively on Friday 2pm at your office?

(if answer NO)

No problem. I think you must be very busy.

If I happen to serve my clients somewhere around your place, I will call you once I have completed my work.

See you, bye!

Hello, 早上好! 您是 Jessie 吗?

请问您方便讲话吗?

我是 Andy 来自宏愿理财。相信我们曾经在某个地方见过面。

我正在整理我的名片时, 看到您的名片。

我就随缘摇个电话给您问好。也许我们可以接回这个缘分。

这样好吗, 如果我有在您的附近做些服务, 那如果时间允许的话也许我就过去拜访您。请问您比较喜欢在早上见客或下午见客?

那我们就暂定在星期五下午两点钟在您的办公室会面好吗?

(if answer NO)

没问题。相信您一定再忙着。

如果我有在那儿活动, 办完事后我就摇个电话给您好了。

3. Face to Face Interview

Hello, good morning, Jessie?

I am Andy from Great Vision. How do you do?

Remember me, we met somewhere at

I am so sorry the other day, I was too rush and couldn't share with you.

How are you doing?

How long have been working here?

What is your company doing actually?

Which area do you in charge?

Let me tell you what I am doing.....

We are dealing with financial advisory, financial planning and training needs of an individual, family or business.

(Insurance?)

Not really, insurance is only part of our planning. We emphasize more on the overall financial needs, advisory and training needs of an individual, family or business.

Option 1

Whenever there is any good financial solution in the market, we will definitely share it with our clients, friends and whoever we meet.

By the way,

Do you have the habit of savings?

Have you planned for your family income protection?

Have you planned for your retirement?

Have you reviewed your life coverage plans?

Option 2

Almost every year, we will organize an annual review campaign or so called a financial health scan for all our existing clients, friends and even to those we met.

We strongly believe that most of the people tend to forget or overlook on this matter. In view of this, have you reviewed your life coverage or scanned through your financial health annually?

(Yes) That's good. I have something to share with you, perhaps it may strengthen your existing plan.

(NO) That's never too late. I have something to share with you, perhaps it may help you now or in the future.

Hello, Jessie 您好!

我是 Andy 来自宏愿理财。还记得我吗? 我们曾经在____见过面。

非常抱歉, 那天我实在太忙了。无法与你分享一些概念。

您在这儿工作好久了吗? 你的工作范围是.....

您的公司是做.....

让我给您知道我们公司的服务范围.....

我们是从事个人, 家庭与企业的理财咨询服务, 财务规划及企业培训服务。

(是保险吗?)

不完全是。保险只是我们规划的其中一项。我们比较注重于个人, 家庭与企业的理财咨询服务, 财务规划及企业培训服务。

Option 1

每次有新消息或新的概念的时候, 我们都迫不及待的与客户, 朋友及任何我们遇见的朋友分享。

谈到这里, 请问您有储蓄的习惯吗?

请问您有为家庭收入做好规划吗?

请问您有为退休做好规划吗?

请问您有为自己的保障做适度的检阅吗?

Option 2

一年一度, 宏愿理财都时常为客户包括所有接触到的朋友们作出财务规划检阅。在为这项活动进行的时候, 我们发现到许多客户当中都缺乏甚至忽略了一些重要的规划。

谈到这里, 请问您有为自己每年做财务规划检阅吗?

(有) 非常好。我有一些计划想与你分享, 也许它能强化您目前的计划。

(没有) 没关系。我有一些计划想与你分享, 也许它对您有帮助。