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|  | Call script |

Script

* Hi. My name is Click here to enter text. and I’m calling from Click here to enter text. CPA firm in Click here to enter text.. Could you please direct me to Click here to enter text.?
* Possible answers: “Yes” or “no” (a “no” response is typically because the person is unavailable, out of the office, in a meeting, etc.).
* If “no”: Would it be possible to schedule a call with Click here to enter text. later this week? Do you have access to his/her calendar? I’m available on Click here to enter text.. Is he/she available then? It shouldn’t take more than five minutes. Or: Is there a better day of the week/time of day to call back to increase the probability of reaching him/her in person?
* Thank you.
* If “yes” (and you get put through to the person): Hi, z. My name is Click here to enter text. and I’m calling from Click here to enter text. CPA firm in Click here to enter text.. I sent you a letter Click here to enter text. explaining why Click here to enter text. like Click here to enter text. have trusted their accounting and advisory needs to us. Did you receive it?
* If “yes”: With your permission, I’d like to take a moment of your time to further detail the opportunity outlined in that letter. Would that be OK?
* If “no”: No problem. With your permission, I’d like to take a moment of your time to briefly explain the opportunity outlined in that letter. Would that be OK?
* If he/she refuses permission: Would there be a better time to call back?
* If he/she grants permission: There are three things I’d like you to know about our firm: Click here to enter text.
* There’s more — but let me get to the purpose of my call. I’d like you to meet our Click here to enter text. partner, Click here to enter text., so that he/she might better understand your organizational needs and share how we can Click here to enter text.. Are you available to meet her at Click here to enter text.? Is your office OK?
* Thanks. I look forward to seeing you then.

Voice mail

Hi Click here to enter text.. My name is Click here to enter text. and I’m calling from Click here to enter text. CPA firm in Click here to enter text.. At your earliest convenience, please call me back at Click here to enter text. to discuss how Click here to enter text. can Click here to enter text.. Thanks.