Initial Contact Script for MFIS

**Client Onboarding STEP 2**

Use the following telephone script as a guide to assist you with making initial contact.

* May I speak with [Potential New Client] please?
* Thank you, [Potential New Client]. This is [your name] calling from [Credit Union/Organization].
* The reason I am calling is that [Referrer Name] told us that you would be interested in learning more about how our services could help you.
* At [Credit Union/Organization] we have a process we follow when bringing on new clients to ensure everyone is on the same page with respect to what you need and what we can provide.
* The first thing is for us to set up an introductory meeting where we both meet and learn about each other and I can find out more about what you are specifically looking for.
* This introductory meeting ranges from 30 to 60 minutes depending on the situation and sometimes we are able to help you with whatever you need right then and there, and other times an additional meeting is required.
* It would be helpful if you could give me an idea of why you are coming in so I can start thinking about how I can help you. Could you tell me a little more about that now?
* Okay great – thank you for sharing. That is very helpful to me.
	+ *Ask additional questions if required to clarify the situation so you feel you can adequately prepare*
* I would also like to add that during our first meeting, it’s important we both establish there is a good fit – that means you believe we can provide the advice and solutions you are looking for regarding [insert their situation here] and we believe we can truly help you and genuinely add value.
* I want to stress that we don’t expect any decisions to be made at this first meeting.
* These types of decisions are important so we want it to be relaxed and informed, not rushed.
* Let’s go ahead and find a day and time that works for both of us.
	+ *Establish a mutually agreeable time to meet – typically 2-4 days out.*
* Great we have our meeting set for [day] at [time].
* Thank you for your time today [Potential New Client].
* I look forward to meeting you.