**Implementation Meeting Confirmation Call Script**

**Client Onboarding STEP 6**

Use the following telephone script as a guide to assist you with confirming the Implementation Meeting – for those clients who require a second meeting for implementation.

**If you speak to them directly:**

* Hello, may I please speak with [New Client Name]?
* Hi [New Client Name] this is [Your Name] calling from [Credit Union/Organization].
* I'm calling to confirm our appointment at [Time and Date].
* At that time, I will be helping you getting everything underway as it relates to the item(s) we discussed in our initial meeting.
* Please bring your [identify any documents that you require to begin implementation].
* Do you have any questions?
  + *If so, answer their questions before proceeding.*
* Great - I look forward to seeing you at [Time and Date].
* Have a great day.

**If you leave a voice message:**

* Hi, this message is for [New Client Name]
* It’s [Your Name] calling from [Credit Union/Organization] and I'm calling to confirm our appointment at [Time and Date].
* During our meeting, I will be helping you getting everything underway as it relates to the item(s) we discussed in our initial meeting.
* Please bring your [identify any documents that you require to begin implementation].
* If you have any questions, feel free to contact me.
* Otherwise, I look forward to seeing you at [Time and Date].
* Thank you – have a great a day.

SPECIAL NOTE: If they have not provided the information required, you will need to reschedule.