**Review Meetings Script for C Clients**

*This is the call script for encouraging C Clients to have a virtual/telephone Review Meeting instead of coming in for a face-to-face review. It is positioned as a matter of convenience to the client, not as a matter of efficiency for us.*

*If the C Client prefers to come in for a face-to-face Review Meeting, it will of course, be booked. Do not go out of your way to make exceptions or overaccommodate for C Clients regarding the scheduling Review Meeting – otherwise, you run the risk of never fully transitioning them to a Virtual /Telephone Review. These meetings will generally take about 20 to 30 minutes to complete, so schedule accordingly.*

* [Client's Name] please?
* This is [Assistant] calling from [Advisor's] office.
* The reason I am calling is to arrange your next Review Meeting with [Advisor].
* Now recently we’ve had feedback from some of our clients letting us know that they are very busy and sometimes it’s difficult for them to find the time to come in for a Review Meeting. We want to be respectful of your time and we understand that you are busy, however making sure we have regular reviews is very important. So, if it is more convenient for you, we are more than happy to schedule a Virtual/Telephone Review Meeting.
* Is this something that you’d be interested in?

***If they say, YES to Telephone Review Meeting:***

* Great, let’s find a time that works for you and get that scheduled now. We expect it will take 20 to 30 minutes.
* How about [date and time]?

*This time-frame should be approximately two weeks from the date of this call.*

*Through client conversation, determine a suitable day and time for the meeting.*

* I’d like to confirm the best number to reach you for this scheduled time – is it this number or an alternate number? Great – thank you.
* Anything discussed during the Review Meeting will be sent out to you ahead of time, so you have it with you.
* Do you have any other questions for me at this time?

*Answer questions accordingly before proceeding.*

* Thank you for your time today [Client Name]. I hope you have a great day.
* As always, if you have any questions feel free to contact us.
* Goodbye.

***If they say, NO to Telephone Review Meeting:***

* No problem – we thought we would ask just to be sure we are making this as easy as possible for you. If at any time you prefer a Telephone Review, let us know and we are more than happy to accommodate for you.
* Let’s go ahead and get your next Review Meeting set.
* Are you available during the week of the [month and date]?

*This time-frame should be approximately two weeks from the date of this call.*

*Through client conversation, determine a suitable day and time for the meeting.*

* Great [Client] – that day and time works for everyone.
* You can expect this meeting to be about one hour.
* Before I go, do you have any other questions [Client]?
* Great - thank you for your time.
* We look forward to seeing you on [date and time].
* Have a great day.