RRR Consultation Scheduling Script

Hello, may I please speak to (Attendee first name). Hi (attendee first name) this is (caller) from Ryan Morrissey’s office at Morrissey Wealth Management. How are you today?

I’m calling to schedule your consultation that you requested with Ryan after attending his Retirement Review Readiness course. Is now a good time to get that scheduled?

If not, when is a good time to call back?

If no answer, leave message:

Hi (attendee first name). This is (caller) from Ryan Morrissey’s office at Morrissey Wealth Management. I’m calling to schedule your consultation that you requested with Ryan after attending his Retirement Review Readiness course. I’d be happy to schedule that for you at your convenience. Please give me a call at (phone) or you can email me at (email) and I would be happy to get you started. I look forward to speaking with you.

If they do not call back in the next couple of days. Send email with same information and offer the calendly link to Ryan’s calendar.

Keep following up the first 3 weeks. Then go to monthly.