



***Prospecting Call Guide to Executive Admin
Follow-up Call to Prospecting Letter
Goal 1: Make executive level contact, or
Goal 2: Get Referral from Office of the Executive***

General Call Tips:

- Act natural. Use your own words.
- Smile when you talk (they can hear a smile!).
- Be organized at your workspace, and have all relevant information handy.
- Try stand when you talk.
- Use the following Call Summary as a guideline – you will settle into your own flow and conversational style.

Call Summary:

1. Introduction and reason for the call
 - a. Hello, this is name from <Company>.
 - b. We spoke last week and I'm calling to follow up on the letter I recently sent to <executive>.
2. Confirm receipt of letter
 - a. Did <executive> get the letter?
 - b. If yes, proceed.
 - c. If no, ask if admin received it and if it was forwarded to the executive.
3. Make executive level contact
 - a. Did (executive) indicate an interest in learning more?
 - b. If yes – ask to schedule a discussion with the executive.
 - c. If forwarded to another contact in the organization, ask to be transferred to that person.
4. Courtesy Comment and Close Call
 - a. Thanks so much for your help.
 - i. I'll call back on <confirm time/date> to speak with <executive> OR
 - ii. Can you please provide me with <New Contact's> extension prior to transferring the call in case it doesn't go through?
 - b. Thanks again – good-bye!