

Referral Follow-up Telephone Script: Existing Customer

Goal: Increase Account Penetration

Introduction:

Hello, this is <Name> with <company>

Reason for the call:

Pick a reason for the call consistent with the campaign and your sales strategy for this customer.

- a) I just called <executive name> and I was referred to you as the right person to speak with about expanding our existing relationship.
- b) I just called <executive name> and I was referred to you as the right person to speak with about our current promotional offer for (describe offer).
- c) <Company name> is an existing customer of ours. We've never spoken so I wanted to familiarize you with the services we've provided for <company> in the past, and to review the status of your account with us.

Moment of Silence:

Wait three seconds for a response of some sort. The goal is to get the executive to ask a question and engage you in conversation. If you don't get a response, proceed with "Who we are"

If asked who we are, respond:

<Insert company positioning statement here>

Proof Statements:

- a) For example, we have worked with your company in the past on projects such as (describe past project).
- b) And just recently ... (describe recent project for a similar company)

The Offer:

I'd like to offer to get together with you to:

- a) Help you take advantage of our special offer
- b) Review some of the projects we have done for <company> in the past
- c) Show you samples of some our recent work with other companies like yours and share some ideas with you about ways we can help you to (describe benefits).
- d) Discuss your upcoming needs and brainstorm with you to see how we can best help you to ensure their success

Close for appointment

May I suggest we get together some time next week? When would work best for you?

If Yes – schedule meeting and close the call.

If No – probe for needs by asking an open ended qualifying question (see examples below), or offer another proof statement and try again.

Sample Qualifying Questions:

- a) Open ended probing question: Can you tell me little about ...?
- b) Open-ended leading question: What are your biggest challenges in the area of...?
- c) Closed-ended question to probe for specific needs: What needs/projects do you have scheduled for this year?
- d) Closed-ended suggestive question: Many companies like yours experience challenges in the area of (describe need or business issue). How do handle this at your company?

Courtesy Comment to Close Call and Confirm next step:

Thanks again <Name>. I'm looking forward to meeting you on <date/time> at <location>. (if appropriate)

Good-bye!