

Keep in Touch | Module #5

The Initial Phone Call

You've created your contact list and made first contact (so they're expecting to hear from you).

Now, it's the day you said you would call them and for some reason picking up the phone feels *hard*. When did the phone become so heavy!

So, how do you make picking up the phone a little easier?

No fear! The steps are here! *Actually they're below (and I promise there won't be any more rhyming ☺).*

1. Talking! And follow-up steps.

I'm going to go through a few scripts and follow-up steps with you here. Why? Because the script for talking to someone is different from the script for leaving a voicemail and both have a different flow of follow-up steps.

Also, these scripts are merely a starting point for you. Change them to reflect your speech and your tone.

1. Step 1: The conversation

They've answered the phone. Here's what you might want to say:

	Hello.	:Your friend
You:	Hi <i>{friend's name}</i> , this is <i>{your name}</i> . Is this a good time?	
	Sure	:Your friend
You:	I mentioned in the letter I sent last week that I wanted to catch up with you and find out what's new and exciting in your life. I'd love to have coffee with you. Does <i>{option 1}</i> or <i>{option 2}</i> work better for you at <i>{location}</i> .	
	I'd love to meet up with you! It's been too long since we talked. I'm putting <i>{preferred option}</i> at <i>{location}</i> in my calendar now.	:Your friend
You:	Great! I look forward to seeing you on <i>{preferred option}</i> at <i>{location}</i> . I'll also send you an email with the information.	
	Wonderful! See you then.	:Your friend

You might consider adding how you know them after saying your name if it's been a while since you talked. This way they can place you quickly.

Occasionally, you'll get someone on the phone who will *love* to talk with you *right now*. That's *great*! We'll be going over that conversation in the next module.

Now, draft your script:

2. Step 2: Follow-up

These follow-up items are highly recommended. They do two things for you:

- 1) They position you as someone who is on top of things and
- 2) They ensure that your friend doesn't accidentally forget about the appointment.

Follow-up email

This is the email that you mentioned in the phone call. You're sending the agreed to time and place.

This is important because sometimes people write down meetings on a piece of paper and it never actually makes it to their calendar or you were talking about the Starbucks on the west side of town and they thought you meant the Starbucks downtown. Basically, this avoids forgetfulness and confusion.

Hi {name},

It was great to talk to you briefly this afternoon! I look forward to seeing you at {location} on {agreed time}.

Until then,
{your name}



Reminder email

The day before your meeting, send another email reminding them about your meeting.

If you're not using Contactually (it also allows you to schedule emails) and you do use Gmail or Google Apps to manage your email, then [Boomerang for Gmail](#)* is a great extension to check out. This extension allows you to schedule up to 10 emails a month for free. If you're sending more than that for your business, I recommend you upgrade to the Professional subscription.

Things come up! This gently reminds your friend about your meeting.

Hi {name},

I look forward to seeing you tomorrow at {time} at {location}.

If you want to get ahold of me before then feel free to call me on my cell at {number}.

Until then,
{your name}

** Note: the link provided is an affiliate link. Meaning I benefit when you sign up using the link. If you prefer to us a non-affiliate link use [this](#) one.*

2. Voicemail! And follow-up steps.

Yes, you'll probably leave a few voicemails. And this process has the most follow-up steps. Continue going through the steps here until you make contact. Let's dig in!

1. Step 1: Voicemail and no follow-up email

You want to be brief and to the point. And smile! It really does come across the phone.

Hi {name}, this is {your name}. I'm sorry I missed you this morning. I was calling schedule a time to catch up, like I mentioned in my letter. My number is {your number}. That's {your number}. I'll call back on {three days} afternoon.

Don't forget to update your contact management system with the new reach out day.



2. Step 2: Voicemail and follow-up email

Three days later, call them back.

Hi *{name}*, this is *{your name}*. I'm sorry I missed you this morning. I'm just calling to set up a time to catch up. I can be reached at *{your number}*. That's *{your number}*.

Again, brief and to the point and note in your contact management system that you'll reach out again in 6-7 days.

Also, note that nowhere in the script does the word "again" appear, as in "sorry I missed you again" or "just calling again to set up a time to catch up." Don't say anything that inadvertently assigns blame. If you accidentally do, don't worry about it. It might be an indication that it's time to tweak your script.

While we didn't mention it in the voicemail, it's time to send an email. Of course, you can mention it if you'd like.

Hi *{name}*,

Sorry I missed you this morning. I was reaching out to set up a time to catch up. It's been so long since we talked! And I wanted to find out how you are and what's new and exciting for you and your business.

I'd love to meet you for coffee at *{location}* on *{option 1}* or *{option 2}*. Let me know what works for your schedule.

Feel free to email or call me at xxx.xxx.xxxx

With Gratitude,
{your name}

3. Step 3

Repeat step one and update your contact management system indicating you'll reach out again in 6 days.

4. Step 4

Repeat step two.

5. Step 5

Repeat step two.

6. Step 6

Repeat step two. When you update your contact management system, put them on your calendar to reach out to again in 3 to 6 months.

Making this system your own

The above steps are what I do. And they're just a guideline. I always look at my schedule before I tell someone when I'll be calling back. After all, I don't want to tell someone that I'll call them on Tuesday morning if I'm going to be with clients all day and unavailable.

Also, decide if you want to include in the voicemail that you will call them back after x days. If you want the extra incentive to make the phone call on the day you intend, then include it. If you know you'll call again without problem, leave it out.

For the call back schedule, play with it to determine what works best for you. Does it work best if you set aside an hour each day to make these phone calls? Or maybe you'd rather spend a longer period and make calls one or two days a week.

However you decide to do it, put it on your calendar.

The outlined voicemail process looks like this:

1	Leave a voicemail saying you'll call in 3 days.	No email is sent	Note to call in 3 days
2	Leave a voicemail.	Send a follow-up email	Note to call in 7 days
3	Leave a voicemail.	No email is sent	Note to call in 6 days
4	Leave a voicemail.	Send a follow-up email	Note to call in 6 days
5	Leave a voicemail.	Send a follow-up email	Note to call in 6 days
6	Leave a voicemail	Send a follow-up email	Note to call in 3-6 months

What does your voicemail process look like?

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____
- 7. _____
- 8. _____

3. Set your intention for the call

This is probably the easiest to overlook and one of the most important things you can do!

Take the time before each call to go through these steps. They may not seem very important at first glance, but in this situation it can make a big difference.

1. **How do you want to feel while you're on the call?**

Do you want to feel confident, sure of yourself, joyful, excited?

What Energy Level will you be at?

Only use only positive wording here! It's much more powerful.

2. **Remember a specific time when you felt that way and describe it here:**

Describe it with as much detail as you can. The more complete the picture the better!

Remember that feeling as you make your call.

3. **What is your ideal outcome?**

What do you want to happen as a result of this phone call?



4. Preparing for and making the phone call

The stuff that help you say what you want to say when you're on the phone.

Now that you have your scripts and how to set your intention, you're ready to start making phone calls. Below are the six steps you can go through before each phone call.

1. **Are you asking for a phone meeting or an in-person meeting? And if it's in person, where are you meeting?**

If in person, do you want to go for coffee, breakfast, lunch, dinner or something else?

You want to know what you're inviting them to before you get on the phone.

2. **Pick at least *three* times you're available over the next 10 days (yep, that means specific days and time).**

This allows you to pick times that are most convenient to you AND it actually makes it easier for the person you're calling. They don't have to look at their schedule and try to find a time, they can look at one or two specific times and tell you if it works, or if given the choice between two, which one works better for them.

3. **Review any notes you have about them in your contact management system.**

This seems like an easy step to skip, after all you probably know this person well! However, you might have forgotten that they have a birthday next week or be reminded to ask about a big meeting that just happened. When you remember these things, you can ask about them.

4. **Review your script.**

Edit as necessary. You'll find that you'll naturally change things up the more comfortable you get.

5. **Set your intention.**

Yes, do this before every call you make. It might seem like a little thing, but it's actually one of the *most* important steps.

6. **Make the phone call!**

Have your calendar and contact management system open. This way you can immediately put the appointment on your calendar and update your contact management system with any notes from the call and/or the next time to reach out.

5. After the call

Phone calls are complete, now what?

1. **Update your contact management system**

When are you reaching out to them again?

Did you talk about anything that you want to remember or ask about later?

2. **Send any follow-up emails that are needed.**

Are you sending a confirmation email, a sorry I missed you email or nothing?

3. **Edit your script if needed.**