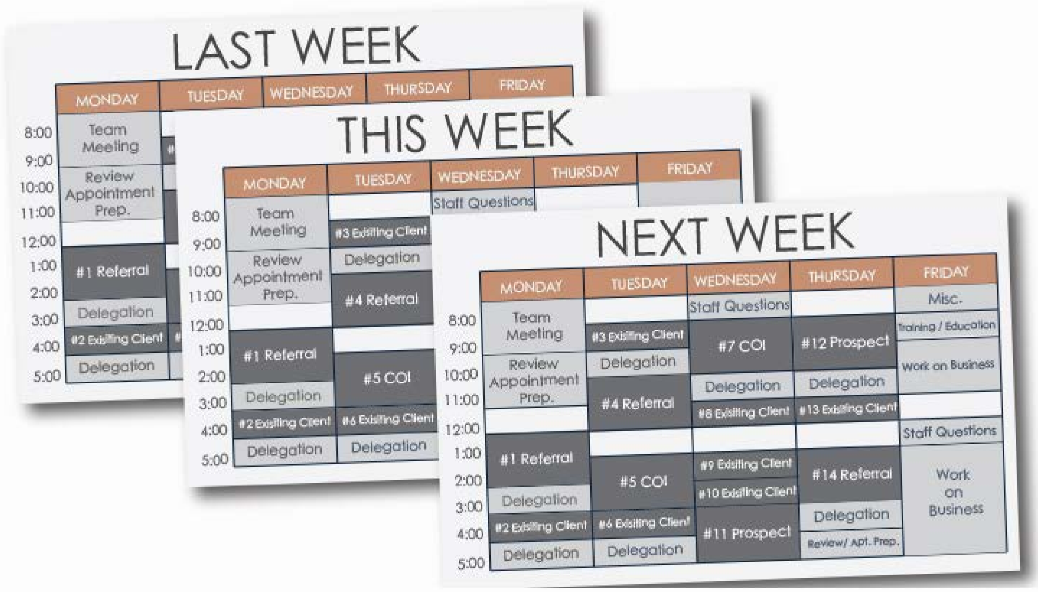

THE 7 OBSTACLES TO FILLING YOUR CALENDAR

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Do you remember when you first started in the business? Daily scheduling and asking for referrals were crucial to surviving. With a packed calendar one week the following week would be ½ full, at best, because you didn't have time to be on the phone. As time slipped by, you began to cherry pick the client base, calling those you thought were possibilities and letting others fall through the cracks.

Filling your calendar, week after week, with the right appointments is crucial to growing the business. In order to do that, one must mine their client base by creating a routine system to keep in touch with prospects, referrals and clients. By doing so, you'll turn prospects into clients and clients into referrers.

The 7 Obstacles to Filling Your Calendar are:

1) Cherry picking the client base

As I speak in front of advisors across the country or consult with them throughout the year, I've learned about 75% of them cherry pick their client base. Why? They don't have a process in place to call everyone in the system. With 300 or 3,000 names, the task seems daunting. Therefore, they randomly pull names to get people on the calendar.

Strategy

Create a routine system. On the 22nd of each month, print a list of the birthdays for the following month and six months later. (e.g. January and July). Review the list to determine who should be called and the course of action. Every prospect, referral, or client should be called, at least every six months. The point of the call is to schedule an appointment, look for new opportunities, or touch base to make sure everything is up-to-date.

2) The advisor won't delegate the scheduling

The most important activity for an advisor is being in front of potential opportunities. If they're meeting with a referral, seminar lead, prospect or an existing client, someone else should be making the calls. Why? You don't have the time! If you have a full calendar, week after week, you would be making calls periodically at best. That means one week may be full and the next fairly empty because there's not enough time to make the dials.

Strategy

Hire someone to make the calls for you. A *trained* marketing coordinator has the time *and,* they become an income generator for you by filling the calendar.

3) Not available when someone calls you back

Getting someone on the phone is the key to scheduling appointments. However, 90% of the time is spent leaving messages. Even more frustrating, you leave a message and when someone calls you back, you're unavailable. Playing phone tag can be frustrating to you and the person you're calling.

Strategy
Delegate the scheduling to a marketing coordinator. When they leave a message, and someone returns their call, they are in the office to intercept the call.

4) Leaving ineffective messages

How many times do you think your message gets deleted because it's long winded? Or, you tell them you want to make an appointment. Or, you leave a message and then don't try again for over a week. You'd be surprised by the statistics!

Strategy
Leave messages that are brief and being persistent will get you a returned call. This simple sequence usually works.

1st message; Hello _____, this is _____ with _____ office. Please call me at _____.

2nd message; Hello _____, this is _____ again with _____ office. I know you're really busy, however I only need a couple minutes of your time. Please call me at _____.

3rd message; Hello _____, this is _____ with _____ office. I've left you a couple of messages, however I haven't heard back from you. Are you getting them? Please call me at _____ or let me know a convenient time to touch base with you.

5) Not asking for referrals

How many referrals do you get a month? Do you have a referral goal? Referrals are the life line to future growth and revenue. In general, advisors forget, don't take the time, or feel they're intruding if they ask for referrals.

Strategy
Create and have your marketing coordinator put a referral sheet in the file before you leave. This will be a great reminder for you to ask for referrals and give you a place to record the information. Alternatively, if the client can't think of anyone at that time, you can leave the referral sheet with them and one of you can follow up with them in a week.

6) Referrals fall through the cracks

You work hard to get referrals so it's important to connect with them. You leave one, two, three messages but you don't get a returned call. What can you do?

Strategy

Leave a brief message mentioning the referrer's name. Hello _____, this is _____ with _____. _____ mentioned your name to me and I look forward to speaking with you. Please call me at _____. After you've left three messages, don't give up, call the referrer and ask for help.

Or, you can send an email; Hello _____, ______ has been kind enough to mention your name to me. I've left a couple of messages and haven't heard back from you, so I thought I would reach out by email to see how we might connect. Please call me at _____. I look forward to speaking with you.

7) Prospects don't turn into clients

When you meet someone for the first time, and the timing isn't right, prospects seem to get lost in the system. Yes, you may call them one or two times but when you consistently stay in touch you'll convert them into clients. How? Call them every six months, same as your existing clients and referrals and don't give up. In my experience of calling prospects, I discovered they eventually came in (about 1 ½ years later) and became a client. Why? I was calling them more than the advisor they were working with did.

Strategy

Print a list of every prospect in your system. Give them a ficticious date of birth (if you don't have one) by using the month you spoke or met with them. This way they will pop up every six months with your clients. Call them twice a year; one time to touch base and the other to schedule an appointment. After 1½ to 2 years of trying switch it up with the following language. "I'd like to schedule a time to reconnect and share some new ideas. What day works best for you." If they put you off again, end with, "Would you prefer to go into my inactive system?" Of course, they'll ask what that means and your response would be; "I will wait to hear from you." If they say yes, put me inactive, great you'll no longer waste your time. If they say no, continue calling, my response was; "I'd be more than happy to do so. However, I'd like to spend about a ½ hour to reconnect, what day works best for you?" It worked for me more than you would think!

So eliminate the cherry picking, delegate all scheduling to connect with opportunities quicker, ask for referrals and have a solid system to work the clients, prospects and referrals. This will lead to a full calendar.

Need help? Call us at 952-829-5300 to learn about our training series, ***The Revenue Resource*** or our scheduling service, ***The Virtual Scheduler***.

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Gina Pellegrini is the owner of Pellegrini Team Consulting, a Minneapolis based firm specializing in leadership training, staff development and practice management. Gina helps business teams streamline systems, increase productivity, strengthen accountability and improve communication. She has a unique ability to size up situations and bring people together. As a consultant, she approaches her work with an unwavering commitment to her clients and their success. With Gina's help, employers become better leaders, and employees get more involved in the company vision, decision-making and growth.

Gina hosts two teleconference series, **The Revenue Resource**, a group series for working the client base and sharpening the phone skills of marketing coordinators, and **The TeamWork Advantage**, a group series on effective leadership and team performance. Her products include *Let Go & Lead!*, *Take Initiative & Succeed!*, *The Appointment Scheduler*, *The Wisdom of TeamWork*, *The Power of Two* and *The Hiring Advantage*.

A professional with broad experience, Gina has worked in the financial services industry for 40 years. She was an administrative/marketing assistant for 17 years for a top financial producer in Chicago before starting her own consulting firm 23 years ago. Gina capitalizes on her special background to produce positive results for her clients and their team.

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