



THE 8 REASONS TO LET GO OF SCHEDULING

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As a successful advisor, you should only be doing three things; meeting with opportunities, prospecting and delegating everything else. Especially scheduling! Growing the business comes from being in front of not trying to connect with referrals and existing clients. However, letting go of the scheduling seems to be a huge struggle for most advisors. Why? They don't think someone will be as effective as they are when talking with prospects, seminar leads or even referrals.

I beg to differ. I made all the calls for my advisor for seventeen years. His calendar was full every week, and the revenue grew exponentially. Today, I train marketing coordinators across the country to become confident and persistent to fill their advisor's calendar week after week. I also have a scheduling service for those that don't have someone to make the calls. Either way, it's important to have someone else make the calls.

Here are The 8 Reasons to Let Go of Scheduling:

1) Daily outbound calls

Your marketing coordinator is in the office all day. Therefore, they can make calls every day.

2) Available when calls are returned

When your marketing coordinator is making the calls, they will be in the office when someone calls back. They can make their calls first thing in the morning and while they are waiting for people to call back, they'll be productive doing other tasks.

3) Building a relationship outside of you

Making check-in or scheduling calls is an opportune time for your marketing coordinator to build a relationship with referrals or clients. By doing so your present or future clients will utilize their abilities instead of always needing to speak with you.

4) Consistently fill the calendar

Daily calls equal appointments. A full week of appointments increases revenue. Spending time in appointments, priceless!

5) Selling the appointment

There's no need to worry about how they're going to handle the phone. When the marketing coordinator is scheduling appointments, and overcoming objections, they are only selling one thing, *the appointment* not a product or service.

6) Routine process

Working the client base takes time. Your marketing coordinator has at least 1½ hours per day to fill the calendar. By doing so, you'll turn prospects into clients and clients into a sale and/or referrer.

7) More quality time

By letting go of the scheduling you will have more time to be in front of referrals and clients to increase revenue. And, you'll have additional time to do other things (family time, reading, working on the business, golfing, traveling, etc.).

8) Another income generator

When you delegate the scheduling to an effective scheduler, they'll become an income generator for you by filling the calendar consistently.

So let go of scheduling! I guarantee you will finally enjoy the reason you joined the business, to be in front of people and sell.





**About the Author:
Gina Pellegrini**

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.