

Campaign Q1 2016 - savings

Script for marketing 2016, Jan – March

Do five calls a day, two days a week.

Hi, Ms Madyo, this is [Bridget] from Daberistic Financial Services. How are you today?

You met Kevin Yeh at one of the conferences, hence we have your contact details. We are promoting unit trust investments and retirement savings. It starts at R500 per month. Would you be interested in saving for your future?

Client answers: [yes]

(clients asks the difference: unit trusts are flexible investments, client can increase, decrease, stop contributions at any time, may withdraw at any time

Retirement annuity is for long-term savings for retirement, contributions are tax deductible, may only access money after age 55)

(If answer [no] – then “can I just update some of your details on our database?” “May I call you again in 3 months’ time, to check if your situation and needs may have changed?”)

Can I just get some details from you to send you a personalised information?

Client answers: [yes]

Your full name, date of birth, email address, name of employer

Retirement age if interested in a retirement annuity

Send client Discovery risk portrait to complete

Thank you. We will send you more information within 24 hours.

[capture deal in pipedrive]

[do unit trust quote with Allan Gray moderate profile;

or RA quote with Discovery Invest, aggressive profile

if client does not send back risk portrait]

Three days later, follow up with client. If interested, hand over to Administrator to send client necessary documents to complete.

[update deal in pipedrive]