Colburn Financial

BOOTCAMP

OUTLINE

Take Notes

Create Notes

DAY 1 – PHONING

Leads

What are the 4 basic types of Leads?

1. _____

2. _____

3. _____

4. _____

What's the Purpose of the Phone Call?

_____

What ways can you work on your mindset?

What ways can you setup your environment?

Take Notes

Create Notes

What are the Weekly Expectations for:

Dialing: _____

Leads: _____

How many Dial hours do you need scheduled on your calendar? _____

How many times do you dial each phone number back to back? _____

What are 3 Hacks you can do to be more personable on the phone?

1. _____

2. _____

3. _____

Take Notes

Create Notes

4 key things in mind when setting appointments?

1. _____
2. _____
3. _____
4. _____

How can you keep things Simple?

- Jot your ideas on the right side of the page

Motto: Be _____ Being _____

☐ Do you have a script?

What kind of Call Control Techniques do you need to implement?

1. _____
2. _____
3. _____

On the right side, write down where you can apply a call control technique

Who are you going to role-play with today??

_____