Easy Online Prospecting Script

TRAINED ADVISOR | ATTRACT NURTURE CONVERT

Prospecting is not about the summer house in Wisconsin, nor the kid learning to ride a bike, and certainly not the dog in the profile picture.

Prospecting is about uncovering the obstacles that keep your ideal audience from reaching their goals using calibrated questions.

Prospecting is a skill that comes from volume.

For some, prospecting is a *PRO*active move - while others take the *RE*active route *(not recommended).*

And for most, **prospecting is quite literally the most impactful action they can be doing to move their business forward every day.**

FACT: Most advisors stick to generic, surface-level statements the prospect has heard a million times from every salesperson they've even spoken with.

FACT: This script digs deep in a conversational, simple, and casual way. It's designed to help you extract the specific issues that stand in the way of success without sounding like a salesperson.

You'll need to figure out how to START the conversation. But once you do (and if you master this script), you'll be operating at a level that turns almost every conversation into a gold mine of insights.

Want to beat out all of your competition?

Start conversations and use this script to book calls.

5 Prospecting Questions to Use to Qualify Prospects

****NOTE:** People do not like to be specific online. It is your job to get specific answers.*

1. “What’s the goal?”

Objective: Keep asking variations of this question until you get a specific target

If the prospect says something like, “I want to help my family,” then push further

- “Gotcha - help your family do what, exactly?
- “Gotcha - like, help them go on vacation twice a year?”
- “Got it - how much do you need to go on two vacations a year?”
    - (Example response: “$15k”)
    - “Ahh, okay, so your goal right now is to make an extra $15k, right?”
    - “Ahh, okay, so your goal right now is to have $5k/month in retirement, right?”

Variations:

- “So what exactly is the goal here, where are you trying to grow to?”
- “So, what's the goal here, what exactly are you wanting to get to?”
- “Can I ask what exactly your goal is?”

2. “Where are you now?”

Objective: Get specific numbers

Variations:

- “How much is in the account now?”
- “Well, right now, what are you working with?”
- “Mind if I ask what the average account size is?”
- “Hmm - well, what's the number it's at right now?”
- “Got it - what's the monthly rev right now? On average”

3. “What’s the hiccup?”

Objective: Identify specifically what’s really holding them back. Don’t use the words “obstacle” or “why.”

Variations:
- “Mind if I ask what’s not working quite right?
- “So what exactly is causing the hiccup right now?”
- “Hmmm - well, in your mind, what's not correct right now - what needs to be worked on?”

4. “What have you tried already?”

Objective: Discover what strategies/tactics they’ve already tried.

NOTE: *If they have tried your solution and failed, reframe your solution or offer something else when they schedule a call.*
NOTE: *Do not offer solutions or lengthy/detailed explanations.*

Variations:
- “Got it - what have you tried so far?”
- “Gotcha. What have you tried already?”

5. “Have you gotten help for this in the past?”

Objective: Understand their history & mindset about getting help; understand if they’ve worked with someone or are currently working with someone.

Variations:
- “Got it - have you ever worked with a financial advisor before?”
- “Gotcha - mind if I ask if you’ve ever gotten help with this stuff in the past?”
- “Hmmm - can I ask if anyone has helped you with this before?”

Final Thoughts

If you've used this script to talk with prospects, then you are already taking a far more precise approach to prospecting than most advisors ever attempt.

Quick Tips:

1. Start 30 new conversations per day
2. Use this script
3. Practice getting information without getting information from people trying to solicit you.
4. Set a timer for prospecting
5. Do not allow emotions while prospecting
6. Do not get off track in the conversation
7. Do not ask more than one question at a time
8. Do not send paragraphs
9. Do not ask "why" questions
10. Respond to every single message, even if it's just a *"Hey, I appreciate the response, have a great rest of your week!"*

Now, knowing the right questions is just step one…

Transforming these conversations into consistent, high-quality appointments requires a full-scale system - one that turns deep conversations into real business opportunities.

And that's where **Trained Advisor** comes in. We specialize in helping life insurance agents, annuity-focused retirement planners, and financial advisors to attract, nurture, and convert high-value prospects by leveraging LinkedIn.

You need a proven process with proper implementation.

And our process doesn't rely on chance. We use targeted messaging, automated follow-up, and smart automations to make sure every conversation has the potential to turn into a booked call.

So, ask yourself:

- Do you want to keep settling for surface-level conversations with bought leads that rarely respond?

- Or are you ready to convert conversations into a steady flow of high-quality prospects?

If you're serious about moving beyond the basics and want to see how to supercharge this script, it's time to talk.

Schedule your free strategy session with Trained Advisor - let's take a peek at what you've got going on right now, try to find a few gaps - then just show you what works for our clients.

You've unlocked the power of calibrated questions.
Now, let's turn that power into real, measurable results.