

## Calling Tips and Techniques

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Call As soon as possible and make certain to follow best practices for maximum value from the list. This is a relationship building call, not a sales pitch so leave behind your "selling words" and use your "telling words" in a very matter of fact way so the parent knows this information is urgent and important. Keep in mind your connection usually means \$100,000 or more in funding offers that DO NOT have to be repaid. For many students this is the largest FREE resource their student will have for college.

**YOUR ONLY OBJECTIVE IS TO SCHEDULE THE QUALIFYING INTERVIEW. YOU SHOULD NEVER TRY TO EXPLAIN THIS OVER THE PHONE. If they will not give you an interview, they are disqualified, and we will alert the colleges that are trying to reach them that they will not meet to learn about their offers. We already know of between 30 and 300 colleges that will offer this student funding. If they qualify at the end of your interview, WE WILL get them funding and meet our Promise of Value (never use the word guarantee)**

GUARANTEE is a legal word, and we cannot guarantee the college wants the student until they apply and get accepted.

Here are some script ideas for you. Make your calls casual and informal. Remember, you volunteered your time to help their student. They requested your call; this is NOT a solicitation.

Develop your own style and remind them you have access to resources to help them plan and fund college for all selected students regardless of income or assets. These are **MERIT BASED AWARDS** your student has been identified to receive and I have been asked to write a brief recommendation.

### Talking Point Ideas to Make Your Own

Hi, my name is \_\_\_\_\_, is this (based on male or female answering) Mr. or Mrs. whomever? I am returning your call requesting more information from a call you received about college endowment awards for your college bound student which came to your home on (Date and Time). Are you the one who took that call? (Regardless of response)

I am the local community member who has volunteered to write a recommendation for college planning and funding from colleges your student would select to attend. I have been asked to conduct a brief interview with you and your student. I called to introduce myself and learn a little more about your student. Is your student a Junior this year?

They will correct you and give you clues as to male or female - i.e., "no, he is a senior this year." If they ask you "which student are you calling about?" ask about ALL students including those in college and those younger. Let them know that for confidentiality reasons we only get the name of the parent and that is why I am calling you. "How is your student in college doing? Where do they attend? How do they like it there? Are your other students wanting to attend the same college or are they open to offers from other schools?"

If you did your preparation properly, you should have the local high school information on a card or sheet of paper during your call session.

"Is Mary attending (high school A or high school B)?" You should be able to determine which high school the student is likely to be attending by their zip code by just searching the schools in your neighborhood that match the location of your candidate. If you do not guess the right school, it does not matter, it just shows you know something about their local community.

"Oh, I see, does she have Mrs. Brown as her counselor or Mr. Johnson?" Here again, you should be able to determine the counselor by looking at the school web sites. You should have a breakdown of each school on a card with the students matched by grade or alphabet. i.e., If your last name begins with A-H your counselor is Mrs. Brown for grades 9 and 10 and Mr. Johnson for grades 11 and 12. This makes you appear "in the know" and connects you to the school through your research. This builds confidence that you are ACTUALLY CONCERNED AND CONNECTED for the benefit of their student. "

"To determine Mary's eligibility to receive these resources I am required to conduct a brief interview with Mary. **You and your husband would be required to attend so you may accept any assistance I may be able to offer on your student's behalf at the end of the interview.** Would a visit at our office on (date time) be possible or would (alternate date time) be better? (A meeting at their home might be an option if they seem reluctant to come to the office. Many prefer to go to the home so you can learn more about them. Lifestyle, family hierarchy etc.)

Next, explain how to get the questionnaire and additional information for review prior to the interview. "I have a brief questionnaire for your student to complete to bring to the qualifying interview which will provide me with some basic information about your student's interests so I may direct you to the resources that best match your student's interests.

Do you have a pen or pencil handy? (Yes or no) Tell me when you are ready, and I will provide you with some information your student will need to receive these awards. Are you ready? Here is my email address. (This is the email address to your auto responder) Spell it out letter by letter and have them repeat it back to you and then say.

**This is really important.**

"Now when you send your email, PLEASE put your student's name in the subject line. If you have more than one college bound student or even in college already, list the oldest first and then the next and so on. Then in the body of your email, tell me in your own words what you are proudest of that your student has accomplished. Provide as much detail as you wish because this helps me prioritize the resources that are available to your students based on their talents and interests. Just tell me the kinds of things you like to say about your students when you introduce them to others. Don't worry if sounds like you are bragging about your student, your insight regarding your student and their accomplishments is especially important to me, after all, who knows our students better than we do as their parents?"

"Once you send that email, I will respond back with additional details about our organization and show you what other students have received because of our recommendations. You will be amazed what resources are available if you know who to approach and how to approach them. I will fill you in during our visit. Keep in mind all resources are committed on a "first come" basis and I have been asked to visit with several your student's classmates so please send your information right away to assure your student priority consideration. "

Alternatively, you might say "I have a brief questionnaire for your student to complete. What email address would you like me to send that to? (Confirm details of email address and repeat at least twice to be certain it is correct and who it belongs to) Would you be so kind as to reply to my email when you receive it? (If you are not using an auto responder to get them the form) That way I know you received the information and will be prepared for our visit.

Because deadline dates are approaching for contacting many of the schools who have interest in your student, it is important that I provide this feedback as soon as possible as I have several other students at your school waiting to hear from me. (They came from the same zip code, remember?)

Would a visit at our office on (date time) be best or would (alternate date time) at your home be better?

(Make the call yourself - If someone else makes the call, it seems like you are too busy to take time to make the call and may diminish your results) Just be personable and conversational. Relationships are built by people - not by scripts. This is your first impression on the family.

Any other responses would be dealt with appropriately with some of the other ideas you gleaned from the scripts. You may also wish to record your calls for coaching support or just for self-analysis. Everyone can get good at this with just a little effort. What is the pay off? End your prospecting problems forever. What effort would you be willing to make to be able to say that?

These are just ideas, and you should modify the approach to match your style and speech. Be casual and focus on their student and the student's goals and objectives and remember . . .

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## OBJECTIONS

The most common question is, "How did you get my student's name?"

I say, "Your student was referred to me through the Student Registry which is a clearing house for those students identified as college bound. Isn't your student planning on attending college? If you want to know the details of how students get on the Registry, [www.studentregistry.org](http://www.studentregistry.org) for details. Usually, it has to do with PSAT, ACT or SAT registration, Honor Roll or achievements that make your student stand out. If they took a precollege test, I expect you have been getting a lot of contact. If your student is in high school and you are NOT getting contacted, you definitely need to visit with me."

If the parent is not open or seem hesitant to schedule the interview, you might say. "Mr. Brown, please let me be clear, I volunteered my time to assist your student in receiving these awards which they have earned through their grades and achievements, these awards often exceed \$100,000. It is NOT, however, my intention or responsibility to try to "talk you into" taking these awards if you wish to forfeit them. Just let me know and we can advise the colleges to withdraw your student and move on to another candidate. I need to arrange a brief interview or move on to another candidate . . . what would you like me to do?"

If they say, "You can go ahead and remove my student" I say, "Really? And you are sure your student is OK with you forfeiting these awards on their behalf without even knowing anything about them or the schools offering them?"

If they persist to be removed, I say, "OK, if that is what you want to do, I will certainly respect your decision to withdraw your student. May I have your email address so I can have our board send you a formal withdrawal, just to show that I made the effort I promised to provide this information to you? Here again, it is your student and your college bill so if funding your student has earned that does not have to be repaid is not of interest, I will certainly provide that feedback to the schools involved. You have nothing to lose to read the information, but I assure you I would not be wasting your time or mine if this were not a valuable resource for college. It is your call.

## WHAT DOES THIS COST?

"The interview costs nothing, and did I forget to mention I am a volunteer? Please understand, just because I am willing to **grant you the interview**, I am not necessarily able to commit funding until I speak with you and your student to determine if these resources are right for your student. I will provide you with everything in writing at the time of the interview and you can accept or decline the offer at that time, should I determine, we can help you."

## IF THEY PERSIST . . .

Here is the situation, if I can commit funding for your Student, I am going to recommend your student to an organization that has a \$100 per year, family membership dues which covers the whole family. If I can make a commitment of \$30,000 or more over 4 years from colleges and universities your student would select to apply to. I will explain the details of how the process works, and like I said, my offer will be in writing with all your questions answered.

Some people will say, "**I'm not willing to pay anything to anyone**" Our counselor told me this kind of thing is a scam and we can do it all on our own."

"Are you telling me you would not be willing to trade \$100 for \$30,000 or more in funding from colleges your student would select?" I do not know what commitment your counselor has made but we have helped fund over \$1 billion dollars in college funding. Send me the email and I'll show you what I mean." If they say NO, I say . . . "WOW! Are you sure we are talking about sending the right person to college at your house?" with a laugh in your voice. It seems unusual that you would want to forfeit these awards without even seeing what they are?

You want them to hear how absurd their statement sounds if they genuinely want to withdraw. Have fun with them and move on to the next. There are a lot more people who want your help.

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