

How to use these templates

These templates are designed for first contact with your new lead to help you arrange that crucial initial consultation.

Each template has [red text in brackets] where you fill in the information unique to each situation. **Don't forget to update the red text colour before sending emails.**

Sometimes, it's not possible to get through to your lead on the first phone call, so we have included voicemail, text, and email templates.

Phone call

Hi [lead name], this is [your name] from [your company].

I got your details from Unbiased.

Thank you for submitting an enquiry earlier. Is this a good time to chat?

If your lead says no, confirm a time and date for a callback.

In your enquiry, you mentioned you're looking for [lead's advice query]. Is this correct?

Allow the lead to elaborate on their query and what they're looking for.

I understand. Don't worry; this is a common question many people have. We've worked with multiple people on [repeat the issue back to the lead], so we have a solid understanding of what's involved.

If possible, elaborate further on your or your company's expertise in the related field, including credentials. An example of work with a previous client works well here.

I understand reaching out for financial advice can sometimes be a bit daunting, but I want to assure you we will do what we can to help you with [repeat the lead's issue].

Once we can address this issue, [highlight the value of having this issue resolved].

Do you have any questions for me? I'm happy to answer any questions you may have.

Answer any questions posed by the lead, ensuring that you remain personable throughout.

I'm reviewing the information you submitted through Unbiased; is it okay if I confirm a few details with you?

Requalify their information.

Perfect, thank you for that.

The next steps would be for us to schedule a first meeting where we can talk through [the lead's issue] in more detail and work to find a solution.

If you are scheduling the meeting on behalf of someone else, make it clear who the lead will be speaking to during this meeting and their relevant experience.

This meeting is free of charge, and you have absolutely no obligation to proceed if you don't want to.

Are you happy to move forward with this?

Great. Should we schedule a meeting for [suggest date and time]?

Find a date and time that works for your lead, be flexible and ensure you confirm a meeting.

We can do this [suggest meeting options, i.e., face-to-face (if so, include destination), video call, or phone call]. What would work best for you?

Great! A [confirmed meeting method] on [confirmed date and time] it is. I'm booking this now.

It was great talking to you today. I'll send over a summary of our conversation today, along with any relevant information you should bring to our meeting, in an email so you have everything in one place.

In the meantime, if you have any questions, please feel free to call or email me; I'm here to help.

Voicemail script

Hi [lead name], sorry to have missed you.

This is [your name] from [your company].

I got your details from Unbiased.

You submitted an enquiry earlier, looking for [lead's advice query].

I'm hoping to schedule a call with you to discuss how I can be of help.

I'll call you again at [give them a date and time of when you'll call back] and send you an email with more information. If there is a better time to reach you, please let me know. You can reach me at [your number].

Looking forward to talking to you.

Text message

Hi [lead name], this is [your name] from [your company].

I got your details from Unbiased as you submitted an enquiry earlier looking for [lead's advice query].

I'm hoping to schedule a call with you to discuss how I can be of help.

I'll call you again at [give them a date and time of when you'll call back] and send you an email with more information. If there is a better time to reach you, please let me know. You can reach me at [your number].

Looking forward to talking to you.

Email template

Subject line: Your matched adviser, specialising in [lead's advice query].

Hi [lead name],

My name is [your name], and I am from [your company].

I got your details from Unbiased.

You submitted an enquiry earlier, looking for [lead's advice query]. I've worked with multiple people on [repeat lead's advice query], so I have a solid understanding of what's involved.

I'm hoping to schedule a call with you to discuss how I can be of help.

You can schedule a meeting at a time that suits you here [hyperlink your appointment scheduling link if applicable], or feel free to call me at [your number].

I'll try to call you again at [give them a date and time of when you'll call back] or if there is a better time to reach you, please let me know.

Looking forward to talking to you.

Kind regards,

[Your name]

What to do if you haven't scheduled a consultation

If you weren't able to organise your initial consultation at this stage, it's time to launch [a consistent contact cadence](#) until you're able to lock in that crucial first meeting.