7 Tips for Setting an Agenda

1

Map out the structure of the phone call

Set out the agenda, tell them how the conversation will go and what the stages of the conversation will be.

2

Spend a little time finding out more about them

This is their time to feel seen and heard. Be friendly but professional.

3

Reserve time at the end of the phone call

Tell them that there will be time at the end of the call to ask any questions they might have.

4

Get their buy-in

Be clear that you'll talk about the services you can offer them during the reserved question time. Ask them if they are ok with this.

5

Find out their intentions

Ask them what they want from this call, and what will make it a success for them.

6

Have questions ready

You can prepare from the answers they've already given you in the pre-qualifying questionnaire.

7

Script out the conversation

Having a prepared script can be a powerful thing. You'll feel freer and a lot more confident.

EXACTLY WHAT TO SAY
CERTIFIED GUIDE

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