

Appointment Setter eGuide

Federal Employee Advocates

Appointment Setter Guide



Helping Federal Employees Build
Their "Bullet-Proof" Federal Retirement

Our Appointment Setters are the engine that drives our growth. Every three weeks we conduct free Webinars where 15,000 federal employees attend so they can learn how to better plan for their federal retirement. We are the most knowledgeable and recognizable experts in this arena. The federal government administers their federal retirement, they DO NOT manage it; a huge difference. We help them MANAGE their federal retirement at no cost to them.

Every week we will send you an Excel Spreadsheet with anywhere between 240 to 510 federal employees (with all of their information) who had registered at one time in the past, for one of these Webinars. The number that we send you depends on which Level of Appointment Setter Program you have elected to participate in. Don't ever delete those spreadsheets, because you may need to refer back to them at some point in time, if you run out of names to call in any given week. Circling back to those you left messages for and didn't respond is commonplace.

Your mission is to set up a free 15-minute Telephone Conference with your assigned Advisor(s) and those federal employees who are in your Spreadsheet. We expect that for every hour you work, you will set one appointment. Don't panic if the first few weeks you don't get there. This is a marathon not a sprint.

Don't be pushy or try to sell them on taking an appointment. We are trying to help them plan for a better federal retirement. We don't charge federal employees for anything we do, nor does the Advisor. Creating the "Value Proposition" for the federal employee to accept the appointment and building a rapport with them is the key to success.

Rapport:

Before you make a call, I would google them (maybe their phone number or LinkedIn) to see if there is some commonality between you and them. Example: they are a member of something you are a member of or have knowledge about, mention it. If not, you have their state and town so Google that to see if something is there you can refer to. A new hospital, a new bridge anything upbeat and happy to start the conversation. If not, then look at their email. See what federal agency they work for. Start the conversation after you identify yourself, with something like *“I see you work at the EPA, what do you do over there?”*

Also make sure you leave a good voicemail if they don't pick up, and that your phone's voicemail message has your name in it and your caller ID has your name on it. Make your voice message short and sweet.

Value Proposition:

Now that we are done with rapport, what about the “Value Proposition?” Why should they take the appointment with the Advisor? The answer is because we have a lot of free resources the Advisor can go over with them. Much of this is on your assigned Advisor's Landing Page. Here are just 7:

1. **The Federal Employee Benefit Maximization Guide eBook.**
2. **Monthly Webinars: www.federalwebinars.com**
3. **TSP Video: www.federalemployeeadvocates.com/tspvideo/**
4. **TSP Calculator: www.federalemployeeretirement.com**
5. **Roth IRA Calculator: www.federalretirementcalculator.com**
6. **Roth IRA Video: www.federalemployeeadvocates.com/rothiravideo/**
7. **200 Articles and whitepapers**

General Rules of Engagement:

- Len's Landing Page: <http://www.federalemployeeadvocates.com/phelps/>.
- Len's CRM Stuff: Phelps@federalemployeeadvocates.net PW: Phelps2022!
- Len's email is: Phelps@federalemployeeadvocates.net
- Len's work week for Appointments:
- Monday through Thursday 10:00 AM to 4:00 PM Central time.

You can schedule appointments in the week you are calling BUT NOT the day after the call date. You can't set an appointment beyond three weeks from the day you are calling. If you call on a Monday, the final day out for that day you can set an appointment for is three weeks from that Monday.

Always set the appointment at Len's Central time zone in the CRM. If you set an appointment for a federal employee in California for noon the federal employee's time, put it on the CRM calendar for 2:00 PM, which is Len's Central time.

Only allow for 5 appointments a day. Be careful not to book appointments at the same time slot.

Appointment Script:

Good Morning (Federal Employee First Name),

This is Amanda with Federal Employee Advocates. I am calling to set up your free telephone consultation with Len Phelps to help you maximize your federal benefits.

This consultation is free of charge, and Len is one of the top federal benefit experts in the country.

During the call Len can answer any questions you may have about your federal benefits and give you free access to the 42-page eBook “The Federal Employee Benefit Maximization Guide” which is a survival guide for maximizing your federal employee benefits.

Would you have any availability either this week or next week? (Depending on the day you are calling.)

As you are setting the appointment, and before you enter it in the CRM, ask them if they are currently working with one of our Approved Advisors.

If they say No: Enter the appointment in the CRM and remind them to have computer access during the call with Len.

If they say YES they are currently working with one of our Approved Advisors:

- Ask them who it is and their contact info.
- Immediately text Vince to see if that person is actually one of our Advisors.
- If Vince says YES, DON'T enter it as a lead in the CRM.
- If he says NO, enter it. If he doesn't respond right away, enter it but when he responds, if he says YES, remove it.

Always nicely try to get their cell number if it's not in the CRM. Just say, *“if you give me your cell number I can set up a text reminder the morning of the appointment.”*

What's Next after you make the appointment?

1. Put it in the CRM calendar by creating an “Event”.
2. Type in any anecdotal appointment information in the CRM notes along with your initials.
3. Send a calendar invite to federal employee through Outlook
4. Mark the appointment in your daily appointment spreadsheet for Vince
5. Mark the appointment on your weekly call sheet and highlight.

Vince needs a Weekly Report with Total Hours/Total Appointments on Friday.

Setting up the appointment is just half of the battle. Having the federal employee show up for the appointment is critical. Use these “Appointment Reminders” to limit your No Shows, which hurt all of us.

First Email Reminder:

Send the Friday before all first appointments that are set for the following week.

Subject Line: ****APPOINTMENT REMINDER****

Hello (Federal Employee First Name)

This is just a friendly reminder of your 15-minute call on (Day, Date and their time) with Len Phelps, your Federal Employee Advocates Approved Advisor.

Len will show you how to use our Proprietary Online Retirement Planning Calculator, which was created exclusively for federal employees. This calculator will truly help you better plan for your federal retirement and is available free of charge to all federal employees.

Len can also answer any questions you may have about your federal benefits, and show you how to better plan for your federal retirement. As an Approved Advisor, all the services Len provides you with are free of charge and without any obligation on your part.

Here is the link for the retirement calculator: <https://www.federalemmployeeadvocates.com/phelps/>

If for any reason this time is no longer good for you, please call me at (Your Number)

Regards, (Your First Name)

(Your number and FEA email)

Your Picture

Second Email Reminder:

Email this first thing the morning of an appointment.

Subject Line: ***Friendly Reminder***

Len Phelps with Federal Employee Advocates is looking forward to speaking with you today at (Appointment Time). Please let me know how it went!

Regards,

(Your First Name)

(Your Phone Number)

(Your Picture)

Send this Text right after the email above:

Good Morning (Federal Employee First name). This is just a friendly reminder that

Len Phelps is looking forward to speaking with you today at (Their Time) He

will be calling from 210-410-3391.