

Safford's Character Reference Call - S.T.E.A.M. Technique

1. Hello, I am trying to reach Char. Ref's Name? My name is (Your Name), and I'm calling in reference to associate's name. He/she recently (interviewed) (started working) with our company and he/she listed you as a personal character reference.
2. Do you have a few minutes to tell me a little bit about associate's name, and possibly answer a few questions?
3. How do you know associate's name _____
4. How long have you known associate's name _____
5. Would you say they have INTEGRITY (*Honest, trustworthy*) _____
6. Why do you feel that way? _____
7. Do you feel _____ is ambitious enthusiastic Hungry for success
 Confident Desires to help others Needs more Money Willing to learn
 - a. Is there anything else that would support our decision to hire associate's name?
8. I want to thank you, Char. Ref's Name. For helping associate's name with a great evaluation.
9. By the way Char. Ref's Name,
 - a. we are going through an expansion, we are listed on the NY Stock Exchange
 - b. we have the highest number of people earning in excess 100k then any other company in the United States
 - c. As you can imagine, that is creating quite a BUZZ for our expansion
 - d. I believe LIKES attract LIKES...so I asked associate's name who he/she knew that was AMBITIOUS, SELF-MOTIVATED, and HAS AN INTEREST IN MONEY like him / herself. And he/she put your name at the top of his list.
 - e. Tell me _____, was he/she RIGHT?
10. So you keep your options open?
11. GREAT...I'm conducting a briefing in the office on (TUES / FRI) evening...to highlight all the details.
12. Can you make yourself available at 7:15 pm?
13. GREAT...do you have a pen? Let me give you the address...I'll wait
 - a. 1840 County Line Road, Suite 105, Huntingdon Vly 19006
14. Now it takes about 60 minutes with visual aids to give you enough information to make an intelligent decision. That's the purpose of the briefing.
15. You'll want to dress in business attire and when you arrive you can ask for me, ok? WFA Great. Now one of the challenges I have is that when an appointment is set, I don't receive at least 24-hours notice when an emergency occurs.
16. So, do I have your word that if an emergency arises, you will give me a call prior to the committed date and time? WFA

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17. **Great.** I will do the same for you. Is this the best number to contact you, or do you have an alternate number? WFA
18. **(Warm voice)** *I look forward to seeing you on (date and time)*
19. While I have you on the phone _____, maybe you can help me find two other key people to help in our expansion???
20. What TWO people do you know, besides _____, that would be an ambitious self-starter, that can use more money (\$1,500-\$2,000/Mo)... OR possibly a FULLTIME career change if the money were right?
21. Great, do you have a way to reach him/her?
22. I want to thank you _____, you have been very helpful. Have a great day!

LEAVE A VOICEMAIL

VOICEMAIL For: **PERSONAL CHARACTER REFERENCE:** Hello, _____.
This is _____ I'm calling on behalf of associate. He/She just interviewed for a position with our company, Primerica...and he/she listed your name as a Personal Character Reference. My name is Tom C O A T E S, my number is 215-350-4708. When you call me back mention associate's name so I know what this is in reference to. It's important. Bye.

VOICEMAIL For **HIGHLY RECOMMENDED Prospects:** Hello, prospect. My name is Tom C O A T E S, my number is 215-350-4708. Your name was forwarded to me recommending you as a possible management candidate with our company. When you get this message, please call me back at 215-350-4708. It is (date/time) and I'll be in my office until about (time). Please call me back today before (time) or tomorrow between (time) and (time).
I look forward to your call. Bye