Phone Script for Scheduling an Introductory Meeting

***One of the most important aspects of “selling” is not to sell over the phone - we simply want to get them to the Introductory meeting.***

“\_\_\_\_\_\_\_\_\_\_, **thank you** for taking this call.”

“\_ \_\_\_\_\_\_\_\_, **do you have a minute or two or is this a bad time?”**

***“Bad time”*** - “Not a problem, when would it be convenient for me to call back?

***“Good time”*** - “Good! Please let me tell you why I’m calling.”

“\_ (optional)\_\_\_, my name is \_\_\_\_\_\_\_\_\_\_\_ and I’m calling for St. Paul of the Cross Retreat Center. I’m a retreatant at St. Paul and I’m also a member of their Board.

“\_ (optional)\_\_\_, as you may or may not know, the operational control of St. Paul is the responsibility of a Board of Directors. The reason I’m calling is because this July we have a couple of openings on the board and your name was submitted as someone who might have an interest in being a board member.”

***“Not interested!”*** – I understand and want to thank you for your time and consideration. (There is no need to make them explain or justify their reason.)

***“Interested – Would you tell me more?”*** - “I’d be happy to do so. Let me give you a thumbnail sketch and, if you’re still interested, perhaps we could meet for breakfast, lunch, or dinner and I could go into more detail.

The size of the Board is set at 12members who can serve no more than two consecutive 3-year terms. The terms expire in a staggered fashion (4 per year) to ensure there is a smooth transition from year to year. We’re beginning the work of replacing some of our current board members in July and your name was submitted as someone who might have an interest. Our effort starts by gathering a pool of men and women with connections to the retreat center who are open to service on behalf of its mission. The new members of the Board of Directors will be drawn from this pool. Would you be interested in meeting and learning more?

***“Not interested!”*** – I understand and want to thank you for your time and consideration. (There is no need to make them explain or justify their reason.)

***“Yes”*** – Wonderful, what would be more convenient for you – a breakfast, lunch, or dinner? Set the day/time/place for your meeting and then close by saying, “By the way, if you don’t mind, one of my fellow board members may join us and between us we’ll be able to answer all your questions.

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**The Voice Message “Sales Pitch”**

\_\_\_\_\_\_\_\_\_, thank you for taking this voice message.

This is and I’m calling for St. Paul of the Cross Retreat Center and I’m sorry I missed you. I’m a retreatant at St. Paul and I’m also a member of their Board of Directors.

“\_ (optional)\_\_\_, as you may or may not know, the operational control of St. Paul is the responsibility of a Board of Directors. The reason I’m calling is because this July we have a couple of openings on the board and your name was submitted as someone who might have an interest in being a board member.”

\_\_\_\_\_\_\_\_\_\_, perhaps you could call me back at \_\_\_\_\_\_\_\_\_\_\_\_ so we can talk further.

I’m looking forward to hearing from you.

Again, thank you for taking this voice message.

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**QUESTIONS/RESPONSES: BE SURE TO CONVEY A SENSE OF PASSION AND EXCITEMENT ABOUT BEING A BOARD MEMBER!!**

***Why me?*** \_\_\_\_\_\_\_\_, Our Director of Mission and Ministry, the Ministry Team, and the Board brainstormed and came up with a list of individuals who we felt had the willingness, insight, and experience necessary to make this type of a contribution to St. Paul of the Cross ... and you were one of those chosen.

***What’s involved?*** You’ll be working with other laity who love St. Paul and collectively you’ll have oversight responsibility for the retreat center. Your past experiences and skills will be called upon in exercising this role.

 ***How much time will it take?*** ***How often will we meet?***  Our Board meets every other month; but there may be committee assignments that will probably require some additional meetings.

***Can you tell me “more” about what is involved in being a board member?*** Best advise is to speak from the heart and answer their question … be candid without getting into detail. You could also say, As you may recall, I said one of the other board members may join us for either breakfast, lunch, or dinner and between the 2 of us we’ll be able to answer all you questions.

***Is there any commitment if I go to the introductory meeting?*** No, the point of the introductory meeting is to simply provide you with more information so you can make a decision about being involved as a board member.

***How long are the board meetings?*** We get together for dinner at 6:00 PM. Our meeting starts at 6:30 PM and we’re usually done by 8:30 PM.

***Is there any liability as a board member?*** No. Like most other non-profit organizations, there is insurance to cover any liability.

***Who else will be involved?*** The current Board consists of 12 individuals, all with strong ties to St. Paul of the Cross as retreatants.

***Is there a financial commitment involved?***While we trust that all board members will support financially, it’s not a requirement. Your gift of time is just as important to us.

***I don’t have any board experience, is that a concern?*** No, many of us on the current Board had no board experience when we were asked to participant. Further, we hold an orientation session for the new board members. Quite frankly, this board experience won’t be too unlike other committee assignments you may have had in the past.

***How much time will those orientation sessions require?*** There will be an hour-long orientation meeting in June for all new board members. You will be inducted at your first full board meeting which will be in September.