College Funding Lead Generation Sample

Introduction (For All Scenarios)

Hi [Prospect's Name], my name is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because we specialize in helping families plan for **college funding** to make sure you or your children have the resources needed to cover tuition and other educational expenses. Whether you're just starting to plan or looking for more ways to save, we can provide expert guidance.

I'd love to ask you a few quick questions to see how we can assist you with college funding.

Qualification Questions (For All Scenarios)

1. **Full Name**:
   Could you please confirm your full name?
2. **Student's Age**:
   How old is the student you're planning for, and when do you expect them to start college?
3. **Current Savings**:
   Do you currently have any savings or investments set aside for college expenses?
   - If YES: How much have you saved so far, if you don't mind sharing?
4. **Financial Goals**:
   Are you looking for help with **scholarships and grants**, **investment strategies**, or **financial aid applications**?
5. **Timeline**:
   When would you like to finalize your college funding plan?
6. **Preferred Funding Strategy**:
   Have you considered any specific college funding options, such as **529 Plans**, **Education Savings Accounts**, or other strategies?

1. Callback Lead Handling (College Funding):

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over your college funding options in more detail?

Step 2: Schedule a Callback

- When would be a convenient time for our advisor to call you back and discuss your college funding goals?
  - **Morning**
  - **Afternoon**
  - **Evening**

Step 3: Verify Details

- Let me confirm your details to ensure the callback is scheduled properly:
  - **Full Name**:
  - **Student's Age**:
  - **Current Savings**:
  - **Financial Goals**:
  - **Timeline**:
  - **Preferred Funding Strategy**:

Step 4: Close the Conversation

- Great! You'll receive a call from our advisor [Advisor Name] at [Scheduled Time]. Please expect the call, and thank you for your time!

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2. In-Person Appointment Handling (College Funding):

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our college funding advisors to discuss your savings goals and funding strategies. Would you be open to meeting with us?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
  - **Option 1**: [Date/Time]

- **Option 2**: [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the appointment:
  - **Full Name**:
  - **Student's Age**:
  - **Current Savings**:
  - **Financial Goals**:
  - **Timeline**:
  - **Preferred Funding Strategy**:

Step 4: Confirm the Appointment

- You're all set for an appointment with [Advisor Name] on [Date/Time] at [Location]. Please let us know if anything changes.

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3. Live Transfer Handling (College Funding):

Step 1: Live Transfer Introduction

- I can transfer you to one of our college funding advisors right now, who can help you review your options and answer any questions you may have about saving for college. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
  - **Full Name**:
  - **Student's Age**:
  - **Current Savings**:
  - **Financial Goals**:
  - **Timeline**:
  - **Preferred Funding Strategy**:

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Advisor Name], who will go over your college funding options and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Advisor Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested**:

  "I understand, but planning early for college funding can help you maximize your savings and ensure you have access to all the resources you need. Would you be open to exploring options at a later time?"

- **Already Have a College Fund**:

  "That's great! Many of our clients already had savings but found that our strategies helped them grow their college fund even more. Would you be open to seeing how we could enhance your current plan?"

- **Can't Afford to Save Right Now**:

  "I understand. We offer flexible strategies that can help you save for college, even if you start small. Would you like to explore those options?"

- **How Did You Get My Information?**:

  "We usually receive information through online inquiries or directories that help families find college funding options."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Student's Age
3. Current Savings
4. Financial Goals
5. Timeline
6. Preferred Funding Strategy
7. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement:

Thank you again for your time, [Prospect Name]. We're committed to helping you achieve your college funding goals and making higher education more accessible for your family. If you have any further questions, feel free to contact us at [Phone Number]. Have a wonderful day!