**First Statement & Service Call Script**

**Client Onboarding STEP 13**

Use the following telephone script as a guide to assist you with the First Statement & Service Call with new clients. Refer to the following page for a Voice Message Script.

* May I speak with [New Client Name] please?
* This is [Your Name] calling from [Credit Union/Organization].
* I'm calling to ensure that you have received your first statement and would like to take a moment to review it with you.
* Do you have 5 minutes right now? Great, I’ll give you a minute to go and get your statement so we can walk through it together.
  + ***If no, rebook for a fixed time in the next 5 business days.***
* Begin to walk through key statement features:
  + Feature 1
  + Feature 2
  + Feature 3
* Do you have any other questions or concerns regarding how to read your statement?
  + ***If yes, answer questions accordingly.***
  + ***If no, proceed to end call.***
* **Also, discuss any other important items like going paperless options, etc.**
* Do you have any other questions or concerns that I can address?
  + ***If yes, answer questions accordingly.***
  + ***If no, proceed to end call.***
* Thank you for your time today [Client Name].
* If there is anything we can help you with, feel free to call anytime.
* It was nice speaking with you – have a great day.
* Good-bye.

**Voice Message Script**

Use the following telephone script as a guide to assist you if the new client’s answering machine picks up.

Due to privacy restrictions, you may be unable to leave detailed information on our client’s voice mail.

* Hello [Client Name], this is [Your Name] calling from [Credit Union/Organization].
* I would like to take a few minutes to review some documentation you may have recently received and answer any questions you might have.
* Feel free to contact me at [your phone number].
* I look forward to hearing from you.
* Thank you and have a good day.