

Accounting Firm Call Script

[Lead-First-Name],

Good [morning-afternoon], my name is [Your-Name] with [Your-Company-Name]. Do you have a minute?

[Lead-First-Name],

We are marketing our service to business owners in your area. Part of what we do is educate business owners how vital it is that they maintain professional accounting records, financial statements, and tax returns. We refer them to local accounting firms like yours for those services.

Would you be interested in us referring business owners to you?

Great.

Let me explain about our core services. We help businesses become bankable, we assist them in accessing funding, we coach them to building strong business credit scores, and help them acquire multiple vendor lines of credit for products and services their businesses need to grow. We also help them optimize their digital marketing positions which maximizes their exposure to new customers.

We market our service to business owners by running a success scan on their business. The scan collects 150 data points and shows them their current financial and digital marketing positions. It identifies areas they should complete or fix. It is free and extremely informative.

If we entered into a referral relationship we could advise business owners in your area to use your accounting services. In return we would like you to have your business clients run a free success scan on their business to see where they stand.

What we can do is to schedule a success scan demo so you can see first hand how it works. When would be a good time to schedule that? [Tomorrow or next business day].

Again my name is [Your-Name] with [Your-Company-Name].

I will be sending you an email with more information, what is the best email to send that to?

I appreciate your time today [Lead-First-Name].

Lead Call After Success Scan - Short

Hi, I am looking for [Lead-First-Name] [Lead-Last-Name]

[Lead-First-Name], my name is [Your-Name] with [Your-Company-Name].

You completed a business finance and credit scan for [Their-Company-Name] on [Site-Name]. We are a company that helps businesses obtain funding, access multiple vendor lines of credit, build strong business credit scores, and optimize all facets of your digital footprint. Do you have a few minutes to talk?

Thank you. Please tell me about [Their-Company-Name], where you are now, and where you hope to be in a year. [Listen]

I am looking at copy of your scan for [Their-Company-Name]. It shows you have not built strong business credit scores yet. It also shows you are not listed yet on most of the local search directories. Are you aware of that?

You're not alone almost every small business owner I talk to is in that same position. The good news is that we can get all that optimized for you.

The scan shows you could be pre-qualified for financing. Would having access to funding be of help to you?

Great. What we can do is first pre-qualify you for the funding. That is free, it does not create an inquiry, and will not affect your credit in any way. This will show us how much can be funded and what may need to be completed to maximize your funding.

Any owner of the business can individually qualify for funding, so your business can get multiple amounts of funding if there is more than one owner. Is there more than one owner in your business?

Here is how we work. First we get you funded, then we help you obtain vendor credit lines for products and services your business uses. Next, we help you build strong business credit scores so that your business can stand on its own for financing, and lastly we make sure all facets of your digital marketing are optimized.

Does that sound like something you can benefit from?

Lead Call After Success Scan - Long

[Lead-First-Name], my name is [Your-Name] with [Your-Company-Name]. You completed a success scan on your company [Their-Company-Name], do you have a few minutes to discuss that?

[Lead-First-Name], please tell me a little about [Their-Company-Name] and what your business model.

How have you capitalized [Their-Company-Name] so far?

Let's take a minute and review the results of your success assessment.

[In the member search area, open their record and login as them to view their]

[Lead-First-Name], we have found that there are three paths that businesses can be on:

- The first is the bridge is out or headed towards business failure. This can lead to the loss of finances, assets, credit and many times personal relationships. Unfortunately 50% of businesses fail over five years.
- Next is the path to nowhere. This is where a large number of owners land. They find they have simply created a long hour low paying job.
- Then there is the success path. This we define as you earning a six figure income and creating a business worth half a million or more if and when you elect to sell it.

Let me explain what our system can do for [Their-Company-Name]. Our first goal is to provide the capital you need to succeed. Our average funding is about \$75,000. The reason we capitalized your business first is so that you will have the money you need to complete all 12 of the key success elements.

A major reason to capitalize your business now is that it helps us to secure additional vendor lines of credit for your business that can stretch your cash flow two, three, or four times by providing Net 30 day payment terms for products and services your business needs to succeed.

At the same time we will be working towards making your business bankable and able to stand on its own for financing. This is done by completing all 20 items of lender compliance, helping you build strong business credit scores, and making sure that your business has at least 10 reporting credit trade lines.

Alex, in your email inbox should be a welcome to [Your-Company-Name] email with your system login ID and Password. Can you check for that now? I can resend it now as well. When you login, the first thing to do is watch the three minute tutorial video. This will let you know how to use the system.

The capitalization we provide normally comes from two programs. The first program is a term loan that typically funds within 3 to 4 days. The second program are credit cards that are usually available for use within 10 to 14 days

Do you have any questions [Lead-First-Name]?

Lead Call After Referral Email Campaign

I am calling to speak with [Lead-First-Name] [Lead-Last-Name] about an email I sent regarding [Your-Company-Name]. Is [Lead-First-Name] available?

If connected:

[Lead-First-Name], your company is a [Business Brokerage, Business Coaching] firm, is that correct? So you have small businesses as your clients, is that right?

We know that for [Pick One by "Industry"]

- *Business Coaching the hardest thing to do is to find businesses that need and can afford your services.*
- *Business Brokering the hardest thing to do is to find qualified sellers with attractive businesses to sell.*

Do you find that to be true?

[Your-Company-Name]'s business success system is a tool that you can use to run a success scan on businesses you connect with. The scan details 150 data points including the status of their pre-qualified funding programs, business credit profiles, owner's personal credit, lender compliance items, 40 local directory listings, star ratings, SEO, social media, and more. The success scan is described in the email I sent you.

The data collected on each business can be shared with you so you can target your best potential clients and focus your marketing efforts. How do you get most of your clients now?

Can we schedule a 15 minute online demo with you to walk you through the system and answer any questions you might have?

If not connected (voice mail):

[Lead-First-Name],

We know that for [Pick One By Industry]

- *Business Coaching the hardest thing to do is to find businesses that need and can afford your services.*
- *Business Brokering the hardest thing to do is to find qualified sellers with attractive businesses to sell.*

Our business success scan is a tool that helps you collect marketing data on businesses so you can target your best potential clients and focus your marketing efforts.

It helps you generate additional revenue from businesses that become your clients, but also generate revenue from prospects that may never become your clients.

I sent you an email with more information about the system and how you can use it to target your marketing.

Please give me a call at [xxx-xxx-xxxx] to discuss how we can increase your revenue.

Chamber of Commerce Referral Call

[Your-Company-Name] has developed a system that is designed to educate small business owners as it applies to financing their businesses and how both business credit and personal credit impacts their ability to be approved. We provide free and easy to access to a comprehensive educational tool for small business in your community.

Our goal of the system is to first educate business owners and then help them to increase their access to the capital they need to start, grow, succeed, and create jobs.

In this way, [Your-Company-Name] can assist the Chamber in having a greater impact with small business development and increasing the business community awareness of the Chamber's value, which in turn will drive new members to the Chamber.

The system begins by educating business owners about Lender Compliance items. These are a series of items that the lender's underwriting computers will check and may decline a business for, if not completed.

Next, the system shows business owners how to make sure that their business is setup the correct way with all the business credit reporting agencies and the government entities that the business will interact with.

When those are done, the system shows each business what is in their business credit reports, what lenders want to see in their business reports, and how to optimize their business credit reports. The system also teaches business owners what business lenders want to see in their personal credit reports and how differently business lenders see those reports versus how consumer lenders view them.

From the Chamber's perspective the system is completely hands off. There is nothing the Chamber needs to do other than to inform businesses about the free educational tool. The Chamber does not have to provide any system support what so ever.

We will welcome the opportunity to provide a demonstration of the system to the Chamber and to anyone the Chamber wants to include in the evaluation process.

Can we schedule a time for a success scan and system demo?

Business Owner After Email Campaign - Short

[Lead-First-Name], good morning/afternoon, my name is [Your-Name] with [Your-Company-Name].com. I'm following up on an email we sent you recently about helping [Their-Company-Name] .

[Lead-First-Name] we help motivated business owners who want to be on the path to success.

We'll help [Their-Company-Name] in four specific ways:

- First, we help our clients to get approved for an average of \$75,000 in funding.
- Second, we help build strong business credit scores so that [Their-Company-Name] can stand on its own for financing.
- Third, we optimize every aspect of your digital marketing to help bring in more customers and more revenue.
- Fourth, we help maximize the value of your business should you want to sell it.

[Lead-First-Name], we've created a free business success scan. The scan takes less than 5 minutes to complete. It will show you the best financing options for [Their-Company-Name], where the business credit currently stands, and the status of your digital marketing. It is free and does not create any credit inquiries either personal or business.

Would you like to know where your business currently stands for available financing and your business credit?

My name again is [Your-Name] with [Your-Company-Name], the phone number to reach me is [xxx-xxx-xxxx].

I will send you an email with more information about our free success scan and my contact details. Please look for it.

Thank you [Lead-First-Name], I look forward to seeing the results of your success scan soon.

Business Owner After Email Campaign - Long

[Lead-First-Name], my name is [Your-Name] with [Your-Company-Name]. I am following up on an email we sent you recently about helping [Their-Company-Name]. Do you have a minute?

[Lead-First-Name], we help motivated business owners who want to be on the path to success.

We'll help [Their-Company-Name] in four ways:

- First, we help get our clients get approved for an average of \$75,000 in funding.
- Second, we help build strong business credit scores so that [Their-Company-Name] can stand on its own for financing.
- Third, we optimize every aspect of your digital marketing to help bring in more customers and more revenue.
- Fourth, we help maximize the value of your business should you want to sell it.

Do any of the ways we help sound like something worthwhile to you?

[If lukewarm, negative, or don't have their attention ... use green below]

Are you interested in growing your business and creating more revenue now? [Listen]

[Lead-First-Name], my reason for calling is to simply to let you know about our free business success scan and what it will do for [Their-Company-Name].

It will show you where [Their-Company-Name] stands for your best financing options, where its business credit is at, and the status of your current digital marketing. It is completely free and does not create any credit inquiries either personal or business.

[If engaged keep going with script here]

Great,

Can you tell me a little about [Their-Company-Name], where it is now, and what you would like it to become over the next few years? [Listen]

[Lead-First-Name], we've created a free business success scan. The scan takes less than 5 minutes to complete. It will show you the best financing options for [Their-Company-Name], where its business credit currently stands, and the status of your digital marketing. It is free and does not create any credit inquiries either personal or business.

Do you happen to know the current status of your business credit profiles?

You're not alone, most business owners don't know. That is something the free scan will show you.

Have you checked to see if [Their-Company-Name] is listed on the local search and map directories with perfect information? There are 40 local search directories and more than 10 map services you should be listed on. That is something the free scan will show you.

Does getting a free business success scan for those sound like something that would help you?

[Lead-First-Name], I am going to email you a link to the free success scan.

Is [confirm their email] the best email to reach you?

Would you mind providing a mobile number or a direct number to reach you?

Are there any questions I can answer for you?

We look forward to discussing the results of your success scan.

Again my name is [Your-Name] with [Your-Company-Name].

I appreciate your time today [Lead-First-Name].

Please look for my email.

UBF Funding Program Focus Call

Introduction: (Gatekeeper)

- Hello, I am trying to connect with [Target Prospect].
- Hello, I am trying to connect with the [Target Title].

Introduction: [Prospect]

Hello [lead-First-Name], this is [Your-Name] from Level4Finance, have I caught you in the middle of anything?

State Value Proposition:

Great. The purpose of my call is to find out if your company might need up to \$150,000 unsecured financing now or in the near future. We help businesses to obtain \$50,000 to \$150,000 in unsecured financing at 0% interest for 12-24 months.

Make Disqualify Statement:

[Choose one]

- I actually don't know if you need what we provide so I just had a question or two.
- I actually don't know if you are a good fit for what we provide so I just had a question or two.

[pause and ask for availability] Do you have a couple of minutes?

Ask Pre-Qualifying Questions:

Great, (Ask all of the questions below and note answers in the file)

- have you started looking for funding options?
- what funding solutions you have already identified?
- how many owners are there in your business?
- have you checked the credit scores of the owners yet?

Give Examples of Common Problems:

As we talk with other business owners we have noticed that they often have concerns about:

- money being way too expensive for a new business
- money being way too difficult to obtain for a new business
- the process of finding sources of financing being overwhelming
- knowing that more than 80% of business credit applications get declined

Which one of those are you most concerned with?

Restate Program Details:

- As I said, I am with [Your-Company-Name] and we provide unsecured business financing for startup or existing businesses
- Our unsecured business financing provides \$25,000 to \$150,000 at 0% interest for 9 to 18 months to help grow your business

Threats of Doing Nothing:

Some things to be concerned with when doing nothing now about your available financing are:

- money can be difficult to obtain for a new business just getting off the ground
- 50% of new companies close in first year due to lack of funding
- our financing comes on revolving terms so it lasts forever and is there when you need it.

Company Facts:

Other key details about us are that we:

- we can help you get up to \$150,000 of financing at 0% interest for 9 to 18 months.
- we can get you approved and the funds available within 30 days.
- We will also help you build strong business credit scores the fastest way possible.

Close:

I do not want to take any more of your time. **[Chose one of the following]**

Option 1 - Trial Close:

- What do you think about what we have discussed so far?
- Is this something that you are interested in discussing in more detail?

Option 2 - Soft Close:

- A great next step would be for you to speak with a Funding Advisor who will identify what you qualify for now , how much you qualify for and what issues might need to address .

Option 3 - Hard Close:

- Now you need to speak with a Funding Advisor who will identify what you qualify for now, how much you qualify for and what issues might need to be addressed.

Option 4 – Last resort bailout fall back

- I understand, how about if I get your email address so that I can place you on our business financing newsletter to keep you up-to-date on available financing programs for your business. I will also send you a free User ID and password to our business finance and credit building system that will help you to build strong business credit scores that are separate from you personally.

Success Scan Email Follow-Up Call

[Lead-First-Name], good morning / afternoon,

My name is [Your-Name] with [Your-Company-Name].

We recently sent you an email about our business success scan and how the scan will show you many ways to help make [Their-Company-Name] more successful.

The scan shows you where [Their-Company-Name] is currently at for its business credit profile, the number of reporting trade lines you have, your web marketing optimization score, if you are listed correctly with 40 online directories, if you have completed the 20 items of lender compliance, and what funding programs are available to you right now. For the funding programs we scan over 4,000 business lenders and more than 3,000 vendor lines of credit.

The scan is completely free, there's no obligation, and it doesn't create credit inquiries of any kind either personal or business.

If you would answer just three questions we can complete a success scan for you. Would you like to see the results?

If they ask questions about anything related to the scan, give one of two answers:

[Answer 1] "That is something your scan results will show you."

[Answer 2] "That is something our specialists will answer once your scan is completed."

[Question 1] Great, what will be your estimated gross annual revenue this year?

[Question 2] We show [website domain] is your website domain name, is that correct?
[or "Does your business have a website domain name?"]

[Question 3] We have the business address as [physical address], is that correct?

Thanks, that's all we need. Your scan will be completed within one business day. One of our specialists will email you your results and will be available to discuss them with you.

We have [email address], is that the best email to send your results to?

We have [phone number], is that the best phone number to reach you?

I appreciate you giving me your time today. I hope your scan results turn out well.

UBF for Startup & Existing Businesses

Introduction: [Gatekeeper]

- Hello, I am trying to connect with [Lead-Full-Name] or
- Hello, I am trying to connect with the [Lead-Title].

Introduction: [Prospect]

Hello [Lead-First-Name], this is [Your-Name] from [Our Company Name], have I caught you in the middle of anything?

State Value Proposition:

Great. The purpose of my call is to find out if your company might need up to \$150,000 unsecured financing now or in the near future. We help startups and existing businesses to obtain \$25,000 to \$150,000 in unsecured financing at 0% interest for 9-18 months.

Make Disqualify Statement:

[Choose one]

- I actually don't know if you need what we provide so I just had a question or two.
- I actually don't know if you are a good fit for what we provide so I just had a question or two.

[pause and ask for availability] Do you have a few minutes?

Ask Pre-Qualifying Questions:

Great, (Ask all of the questions below and note answers in the file)

- Have you started looking for funding options?
- What funding solutions you have already identified?
- How many owners or principals are there in your business?
- Have you checked the credit scores of the owners yet?

[if just one owner, then "have you checked your credit scores yet?"]

Give Examples of Common Problems:

As we talk with other business owners, we have noticed that they often have concerns about;

- money being too expensive for a new business
- money being too difficult to obtain for a new business
- the process of finding sources of financing being overwhelming
- knowing that more than 80% of business credit applications get declined

Which one of those are you most concerned with?

UBF General Sales Pitch – Selling Money

[This is a general selling money closing tool]

So let me explain how the program works and what you can expect, ok?

- These revolving lines of credit are 0% for up to 18 months and as low as 9% thereafter.
- Since banks know that small businesses go in and out of business, they will limit the amount of funding they are willing to extend on a client by client basis. So therefore, you will have several credit lines that make up the total funding amount.
- These are revolving lines of credit (credit cards) that you can use over and over again unlike a loan which you can only use once.
- They will be a blend of 50% personal and 50% business. Some will be listed in your name, some in the business name, and some in both names. But money is money, right?
- The process takes approximately 3-4 weeks once you've cleared documentation, which takes about a week.
- We only charge our success fee once we secure your credit lines for you. We charge 8% on the amount we obtain for you. And that is only due once we get you funded. You will receive two invoices; One for \$3,000 for the first \$25,000 in funding, then a second invoice once we have completed the entire process. You may also use the credit line we secure for you to pay your success fee.
- You never have any out of pocket expense to secure your funding. No application fee, no pre-qualification fee, no advance fees of any kind.

Do you understand how the program works? Do you have any questions?

Next - we need to send your UBF agreement. It will be coming from a digital online signing service.

Everything I have covered here is in the agreement.

Once we receive your signed agreement someone from our processing center will reach out to you to complete the funding process.

Great! Looking forward to getting you funded.