



Given the Current COVID-19 and Financial Crisis

What are the *Best Questions* to Ask?

Tom Hopkins said, “You can’t make a sale until you make a friend.”

During the COVID-19 crisis and its impact on the financial markets, we must adjust our strategies and reasons for calling leads in the database as well as depositors. They are more concerned with their survival than hearing about your community. We must be compassionate. Show true concern. And continue to build the relationship.

The following are suggested questions to ask them – to get them talking about what’s really on their minds. That’s all that matters. And, add your list of questions, too. After these crises, we can go back to ‘selling.’

Opening Questions

1. Just calling to check on you – to see how you’re doing.
 - a. These are unusual times, aren’t they?
 - b. How are you doing?
 - c. Are you self-quarantining?
 - d. Do you have enough food?
 - e. I hate to ask you, but what about toilet paper? **LOL**
2. What have you been doing for entertainment?
3. Is there anything you need?
4. What’s your biggest concern these days?

Family

1. What have you been doing or how have you been communicating with your family and friends?
 - a. Is there anything we can do to help you with technology so you can communicate easier with family and friends. (i.e. Skype, Zoom or Facetime)
 - b. Do you communicate via Facebook? Other social media?
2. How’s your wife/husband?
3. How are your children?
4. Grandchildren?
5. Your neighbors?
6. Is everyone healthy?

Health

1. How do you feel these days?
2. Do you need transportation to see a physician?
3. Are you able to get all of the medications you need?
4. How can we help you?
5. They say that hydrating – drinking lots of water – helps the body to stay healthy.

Food

1. What have you been doing about food and meals?
2. Can we help you with any errands you might have or need to have done? Grocery, Bank? Medical?

Exercise

1. Are you able to get outside and walk?
2. What are you doing to get exercise?

Social

1. Are you able to see your family?
2. Are you able to see/visit with you neighbors?
3. How does that make you feel?

General

1. Do you need anything done around your house we can help you with? Trash, yard work?
2. Can we help you with any errands you have or need to have done? Bank, grocery, medical, etc.?
3. Are there any questions you have for me about how we can help you?

Past the time

1. What are you doing to past the time?
2. Read? If so, what?
3. Do you like jig saw puzzles?
4. Are you getting fresh air each day?
 - a. Sunshine?
 - b. They say that's really important!

Optional: Your Community

1. Are you concerned about _____ (our community) being safe?
2. Do you have any concerns?
3. What are your concerns?
4. I'd like to share with you what we have done to keep our residents safe.
 - a. Make a list, share with them and pause often for them to ask questions.
5. Point out the fact that the "Community" provides basic needs: food, shelter, toilet paper, peace of mind, fellowship, medical attention when needed.
 - a. How does that make you feel?
6. I want to reassure you that we are doing everything possible to keep our residents and staff safe, including.....especially.....
 - a. Can you think of anything else we could or should be doing?

How to end the call

1. I'm certainly glad you're doing well.
2. I've enjoyed our visit.
3. May I call you about the same time next week?
 - a. Day
 - b. Date
 - c. Time
4. In the meantime, please feel free to call me if you have any questions.
5. Can I pray for you or with you?



Retirement **DYNAMICS**, Inc
PO Box 667986
Charlotte, NC 28266-7986
888-897-7768