



Greeting: Thank you for calling [CampaignName]. This is [OpName]. How may I help you?

- i. Caller is Interested in Service
  - a. Would you like to schedule a free consultation with our CPA?
    - i. Yes (Schedule)
      1. Okay, I just have a few questions for you, if that`s alright. May I have your first name?
      2. May I have the spelling of your last name?
      3. And what is the best number to reach you?
      4. Thank you, [FirstName]. Can you please provide your email address?
      5. Alright, may I have your street address please?
      6. Okay, [FirstName], do you have un-filed tax returns?
        - a. Yes (Unfiled)
          - i. Thanks, [FirstName], for what periods?
          - ii. And, what notices have you received from the IRS?
          - iii. Okay, [FirstName], do you have unpaid taxes?
            - i. Schedule appointment
    - ii. No
      1. Okay, I just have a few questions for you, if that`s alright. May I have your first name?
      2. May I have the spelling of your last name?
      3. And what is the best number to reach you?
      4. Thank you, [FirstName]. Can you please provide your email address?
      5. And, how did you hear about us?
      6. Thank you, [FirstName]. What message would you like me to pass on?
      7. Okay, [FirstName]. I will send your information along and have your call returned. Thank you for calling, and enjoy your day!
        - a. Send message through

ii. Calling to Cancel or Reschedule

a. Would you like to Cancel or Reschedule your appointment?

i. Cancel

1. Okay, I just have a few questions for you, if that`s alright. May I have your first name?
2. May I have the spelling of your last name?
3. And what is the best number to reach you?
  - a. Cancel appointment

ii. Reschedule

1. Okay, I just have a few questions for you, if that`s alright. May I have your first name?
2. May I have the spelling of your last name?
3. And what is the best number to reach you?
4. Thank you, [FirstName]. May I have the date and time of your appointment please?
  - a. Reschedule appointment

iii. All Other Calls

1. Okay, I just have a few questions for you, if that`s alright. May I have your first name?
2. May I have the spelling of your last name?
3. And what is the best number to reach you?
4. Thank you, [FirstName]. Can you please provide your email address?
5. And, how did you hear about us?
6. Thank you, [FirstName]. What message would you like me to pass on?
7. Okay, [FirstName]. I will send your information along and have your call returned. Thank you for calling, and enjoy your day!
  - a. Send message through