

[ Email] Setting expectations pre-referral: Email to send to your clients right before you send their referral through.

Subject Line: Your referral to Prospr is being sent today - here's what you can expect

Hi [Your Client's Name],

Thanks for your confirmation to refer you to Prospr by Sun Life! I'll be sending your referral shortly. But first, wanted to give you a rundown on what to expect:

- 1) Once I send the referral, you'll receive a confirmation email that it has gone through. In it, there will be a booking link where you can book a time with a Prospr advisor. You don't *have* to book - it's just if you want to pick the time. I do advise you to book - it's just easier than playing phone tag with them ;)
- 2) If you don't book, a Prospr advisor will call you within 48 hours of the referral. They typically call from a 1-888 number. With my other clients, it's been the number 1-888-444-9983. It may show as "Sun Life" on the caller ID.
- 3) If you can't pick up when they call, no worries. They'll leave a voicemail and send you an email. Reply to the email or call them back. Again, you can always use the booking link [HERE](#) if you prefer to just select your appointment time.

Let me know if you have any questions!

Speak soon.

[Your Signature]