MERCHANT ADVOCATE

REMOTE SALES & LEAD GENERATION SCRIPT

PRIMARY GOAL FOR THE FIRST CALL OR VISIT IS NOT TO EXPLAIN MERCHANT ADVOCATE IN DETAIL OR TO SELL THE ENTIRE PROGRAM!

Sales Agent Goal: Create enough interest to move the business owner into a deeper conversation

Lead Generator Goal: Create enough interest to move the business owner into a deeper conversation with your assigned Sales Agent

And to ultimately obtain three months processing statements for no-obligation review!

OPENING

Lead Generator:

Hi, is this [Name]?

Hi [Name], this is [Your Name] with Valued Merchant Services.

I know you probably get calls about credit card processing all the time, so I'll keep this really short.

We have a program that looks for ways businesses may be able to reduce their credit card processing costs **without having to switch processors.**

Would you be opposed to hearing how it works?

IF THEY SAY YES / WHAT IS IT?

Great.

We have an advocacy program that independently reviews what you're currently paying, looks for unnecessary fees or areas that may be costing you more than they should, and if there is an opportunity, we can work with your existing processor to try to lower those costs.

You don't have to change processors, equipment or POS systems just to have the account reviewed!!!

The first step is simply having one of our Agents explain it and see if it makes sense for your business.

Would **[day/time]** or **[day/time]** be better for a quick conversation?

SHORTER VERSION

Hi [Name], this is [Your Name] with Valued Merchant Services.

Quick reason for my call/visit—we now have a program that can review a business's existing credit card processing costs and look for savings **without requiring them to change processors, hardware or software.**

I wanted to see if you'd be open to a quick conversation with one of our Agents to see if there's anything worth looking at.

CURIOSITY VERSION

Hi [Name], [Your Name] with Valued Merchant Services.

Quick question:

When was the last time someone other than your processor independently reviewed your processing fees?

[Allow response.]

That's actually why I'm calling.

We have an advocacy program, which looks for unnecessary fees, pricing issues and potential savings while allowing you to keep the processor, hardware & software you already have.

Would you be open to letting one of our Agents explain the program and see whether it makes sense to review your statements?

IF THEY SAY:

“I'M HAPPY WITH MY PROCESSOR.”

That's actually perfect.

We're not calling because you need to leave them.

Our advocacy program works with businesses that want to keep their current processor but would still like an independent set of eyes looking at what they're paying.

If everything is already great, that's good to know too.

Would you be open to a quick conversation to see if it's worth reviewing?

“WE'RE NOT SWITCHING PROCESSORS.”

Understood—and you wouldn't have to.

That's really the whole reason this program is different.

The goal is to see whether anything can be improved **with the processor you already have.**

Would it hurt to have someone take a look?

“WE ALREADY HAVE GREAT RATES.”

You may.

The question is really whether the entire account is optimized—not just the rate.

Our advocacy program looks at the overall statement for fees, pricing and other areas where costs can sometimes creep in.

If there's nothing there, great.

Would you be open to having it independently reviewed?

"WE JUST SWITCHED."

That's actually still worth looking at.

A new processor doesn't necessarily mean every part of the account is set up as efficiently as it could be.

And because you don't have to switch again, there's no disruption involved in having it reviewed.

"OUR POS SYSTEM HANDLES OUR PROCESSING."

No problem.

That's actually one of the situations where this can make a lot of sense because we're **not asking you to replace your POS system.**

The idea is to see whether there are opportunities within the processing relationship you already have.

"MY BANK HANDLES IT."

That's completely fine.

Our advocacy program isn't asking you to leave your bank.

They're simply providing an independent review of what you're paying.

Would you be open to having someone take a look?

“NOT INTERESTED.”

Totally understand.

Can I ask you one quick question before I let you go?

Is it mainly because you don't want to go through the hassle of changing processors?

If YES:

That's actually why I called.

You don't have to change processors for this program.

It's simply an independent review of what you're already paying.

Would a quick conversation about that be unreasonable?

“JUST SEND ME INFORMATION.”

Absolutely.

The main thing to know before I send anything is that this **isn't another processor-switch pitch.**

Our advocacy program reviews your current processing and looks for potential savings while you keep the relationship you already have.

I'll send you the information, but it usually makes more sense after a short conversation with one of our Agents.

Would [day/time] work for a quick call?

“WHAT DOES IT COST?”

The initial statement review can be done without an upfront consulting fee.

If our advocacy program identifies an opportunity and the merchant decides to move forward, their compensation is tied to savings they actually produce.

Our Agent can explain the details before you agree to anything.

“HOW MUCH CAN YOU SAVE ME?”

That depends entirely on what the statements show.

We don't want to promise a number before anyone has reviewed the account.

Some merchants may have significant opportunities and others may already be in pretty good shape.

The statement tells us whether there's something worth pursuing.

MOVING TOWARD THE STATEMENT

If the merchant becomes interested:

Great.

Ultimately, the easiest way to know whether there's an opportunity is to have an Agent from our advocacy program look at the actual processing statements.

They prefer the **three most recent statements**, but **one is enough to get the process started.**

One of our Agents can help you with that.

APPOINTMENT CLOSE

Perfect.

Let me have one of our Agents speak with you briefly and walk you through the next step.

Would **[Option A]** or **[Option B]** work better?

GATEKEEPER VERSION

Hi, this is [Your Name] with Valued Merchant Services.

I'm trying to reach the person who handles the company's credit card processing expenses.

We're not calling to replace their processor—we have a program that independently reviews processing costs for potential savings while the business keeps its current provider.

Who would be the best person to speak with?

VOICEMAIL

Hi [Name], this is [Your Name] with Valued Merchant Services.

I'm reaching out because we have a program that helps businesses look for savings in their current credit card processing **without requiring them to switch processors.**

I thought it might be worth a quick conversation.

You can reach me at [number].

Again, this is [Your Name] with Valued Merchant Services.

THE LEAD GENERATOR MINDSET

Don't try to teach the merchant everything, our advocacy program does.

Don't start explaining interchange.

Don't debate their current processor.

Don't promise savings.

Don't turn a simple idea into a ten-minute presentation.

Remember the hook:

"YOU MAY BE ABLE TO LOWER YOUR PROCESSING COSTS WITHOUT SWITCHING PROCESSORS."

Then ask a question.

Create curiosity.

Get the merchant talking.

THREE QUESTIONS TO REMEMBER

If you forget the script, remember these:

1. “When was the last time someone other than your processor independently reviewed your processing costs?”

2. “If you could potentially lower those costs without changing processors, would you be open to looking at it?”

3. “Would you be willing to have us review your statement and see if there's anything worth fixing?”

That's the conversation.

DON'T SELL THE AUDIT.

SELL THE REASON TO TAKE THE NEXT STEP.