



Setting Up an Informational Interview over the Phone

Phone Tips

Remember the purpose of your call is simply to obtain a meeting to discuss information, but you want to still be as composed and professional as you would be in person.

- Carefully consider what you wish to say before you make a call. If necessary, write a brief script and practice it.
- Know what results you would like from the conversation. If you have a clear idea of what you want, you are less likely to be side-tracked or hang up before you have accomplished your goal.
- Be very specific. “I am trying to learn all I can about the finance industry and would like to arrange an informational interview.”
- Be as presentable over the phone as you are in person. Always identify yourself at the beginning and sound enthusiastic. It is also important to be polite and reasonable.
- Use an affirmative and articulate manner. If you sound tentative, it’s easier for the listener to dismiss your request.
- Follow up on leads as soon as possible. Opportunities have a way of disappearing very quickly.
- If you have to leave a message, be specific about where and when you can be reached. Be sure your own voicemail message is professional in tone and content.
- Always be sure to be respectful to the staff that may answer the phone or greet you.

Overcoming Phone Obstacles

- If the person with whom you need to speak is never in the office, ask an assistant when the person will return or if there is a better way to contact him or her. Sometimes a clear, concise voicemail is the best way to introduce yourself. Often, calling before 9am or after 5pm is a good time to reach someone.
- If following up on a contact, here are some responses to “May I ask why you are calling?”: 1) “I’m calling in response to a letter from Mr. Smith.” 2) “Mary Jones suggested that I call/follow up.” or 3) “This is about the letter that I recently sent.”
- If scheduling for something in person, first ask their availability. You should also have some times in mind in case they ask you to set the meeting. “How is Monday or Thursday after 2:00 or Wednesday before 12:00?”
- Cold calling someone can be very difficult. Be prepared for a few hurdles and uncertainty if/when you do make contact. Be respectful of their time and their temporary confusion until they understand more about why you are reaching out to them. Whenever possible, try to meet your contact in person so that he or she can get to know you and your unique strengths.