



Opening-Up a School With the Principal

TIPS:

✓ Sound and act like you already have an appointment
✓ Be confident
✓ Upbeat

Principal is NOT Available

You	“Hello, I’m here to see Principal Dr. _____”					
Clerk	Is the Principal expecting you?”					
You	“She should be!! I am back out for our annal service call.”					
Clerk	Will she know what this is reference to?					
You	• “We are the Chicago Teachers Union ENDORSED benefit plan provider” TIP: <table><tr><td>✓ Show/flash the front of the book with the CTU letter of endorsement.</td></tr></table> • “Will take 2 minutes” • “We’re going to coordinate both Teachers and Staff an appreciation day.” And a school donation to your school	✓ Show/flash the front of the book with the CTU letter of endorsement.				
✓ Show/flash the front of the book with the CTU letter of endorsement.						
Clerk	The Principal is not here. Can you leave a card?					
You	“No worries. I’ll come back.” When do you expect him/her to return?” TIPS: <table><tr><td>✓ Do not leave a card</td></tr><tr><td>✓ Do not leave the folder</td></tr><tr><td>✓ Explain very little</td></tr><tr><td>✓ Exit quickly after thanking them for their time</td></tr><tr><td>✓ Do not linger</td></tr></table>	✓ Do not leave a card	✓ Do not leave the folder	✓ Explain very little	✓ Exit quickly after thanking them for their time	✓ Do not linger
✓ Do not leave a card						
✓ Do not leave the folder						
✓ Explain very little						
✓ Exit quickly after thanking them for their time						
✓ Do not linger						

Cont’d



Opening-Up a School With the Principal (cont'd)

Principal is Available				
You	“Hello Dr. _____!!! “Oh, you’re not a Dr.? You look like a Dr.!” TIPS: <table><tr><td>✓ Always call the Principal Dr. even if your research shows they are not</td></tr><tr><td>✓ Google is not always accurate</td></tr><tr><td>✓ If not a Dr., make light of it by say, “well, you look like a Dr.!”</td></tr></table>	✓ Always call the Principal Dr. even if your research shows they are not	✓ Google is not always accurate	✓ If not a Dr., make light of it by say, “well, you look like a Dr.!”
✓ Always call the Principal Dr. even if your research shows they are not				
✓ Google is not always accurate				
✓ If not a Dr., make light of it by say, “well, you look like a Dr.!”				
	Chit chat briefly if Principal doesn’t indicate she/he is short on time: • How long have you been at this school • From Chicago? • You have a nice office • Look for personal items such as photos and comment on them			
You	• “Dr./Mrs./Mr./Ms._____ We are the endorsed provide of the Chicago Teachers Union for the group voluntary benefit plan.” • “Great news! (say with ENTHUSIASM!!) We are providing a lunch or breakfast for all your Teachers and Staff!” (we call it a staff appreciation day) a • “Would your Teachers and Staff prefer breakfast or lunch during the Professional Development Day meeting?” • “Only thing we ask is you allow us to make a 5-minute announcement at the beginning of your meeting!” TIPS: <table><tr><td>✓ The announcement is to BRIEFLY explain we’re the Chicago Teachers Union endorsed providers</td></tr><tr><td>✓ Providing lunch or breakfast</td></tr><tr><td>✓ Be sure to enter the drawing to win prizes such as a \$25 gas gift card, movie gift card and CASH!</td></tr></table>	✓ The announcement is to BRIEFLY explain we’re the Chicago Teachers Union endorsed providers	✓ Providing lunch or breakfast	✓ Be sure to enter the drawing to win prizes such as a \$25 gas gift card, movie gift card and CASH!
✓ The announcement is to BRIEFLY explain we’re the Chicago Teachers Union endorsed providers				
✓ Providing lunch or breakfast				
✓ Be sure to enter the drawing to win prizes such as a \$25 gas gift card, movie gift card and CASH!				
You	“What time are you having the meeting? “What day?” “Who would you like me to coordinate the details with” (Usually the Clerk)			
Cont’d				



Opening-Up a School With the Principal (cont'd)

You	"Dr./Mrs./Mr./Ms. _____, we'll also donate to your school money for classroom materials through <i>DonorsChoose!</i> "I am leaving this folder with you that explains a little bit about us." (Leave The Educators Benefits Company folder AFTER you remove the Set-Up Form)								
You	(Use Set-Up Form) Dr./ Mrs./Ms./Mr. <u>Clerk's Name</u>. I look forward to working with you for the upcoming lunch/breakfast!! Ask the following questions: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">✓ Total number of Teachers and Staff</td><td style="padding: 2px;">✓ Name of contact</td></tr> <tr> <td style="padding: 2px;">✓ Date of meeting and lunch/breakfast</td><td style="padding: 2px;">✓ Email of contact</td></tr> <tr> <td style="padding: 2px;">✓ Time of meeting</td><td style="padding: 2px;">✓ Meeting location</td></tr> <tr> <td style="padding: 2px;">✓ Time of lunch/breakfast</td><td style="padding: 2px;">✓ Lunch location</td></tr> </table>	✓ Total number of Teachers and Staff	✓ Name of contact	✓ Date of meeting and lunch/breakfast	✓ Email of contact	✓ Time of meeting	✓ Meeting location	✓ Time of lunch/breakfast	✓ Lunch location
✓ Total number of Teachers and Staff	✓ Name of contact								
✓ Date of meeting and lunch/breakfast	✓ Email of contact								
✓ Time of meeting	✓ Meeting location								
✓ Time of lunch/breakfast	✓ Lunch location								
Next Step	- That same day have the home office send to the Contact person the introduction e-mail with the lunch or breakfast flyer. - Order the food - Gather decorations								