

The Prospect Building Process

This Session:

Prospect Building Process - Steps 1 - 4
Expanding Your Initial Markets by Obtaining Introductions
from Centres of Influence

Pre-Session Work:

"Identifying Your Initial Market" - Project 200

Goal:

5 Introductions per 1 Face to Face Meeting with a
Centre of Influence

Prospect Building Process



Step		Learned	Practiced	Mastered
1	Preparation			
1.1	"Identifying Your Initial Market" Completed			
1.2	Natural Market Identification			
1.2.1	Five Star Rating System			
1.2.2	Sort by Prospect (protection need, other need, C of I, future)			
2	Preparing Your List of Contacts			
2.1	Select Names from Project 200 to Contact as C of I			
3	Make Appointment with Networkers & Acquaintances			
3.1	Call Centre using "Telephone Talk to someone you know/Centre"			
3.2	Book face to face Appointments			
4	Meet with Potential Centre of Influence			
4.1	Complete your motivational "why" story including the relevant points below			
4.1.1	Introduce yourself – business philosophy, why you entered the business			
4.1.2	Why people should deal with you			
4.1.3	Team approach – discuss why you chose HUB			
4.1.4	How you work - Process			
4.1.5	How you are compensated - general overview			
4.1.6	Show "Simple Conversation Brochure" or other tools			
4.1.7	Ask for introductions			
4.1.8	Optional: Have C of I write a note on a Pre-Approach Letter, send introductory note (email, text, SM platform) or have personal call introduction			



Exporting Your Contacts

Use the instructions on the following pages to export your contacts for use in Project 200

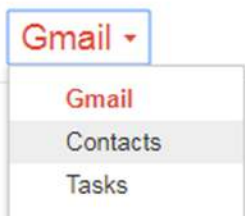
HOW TO EXPORT YOUR CONTACTS

Gmail

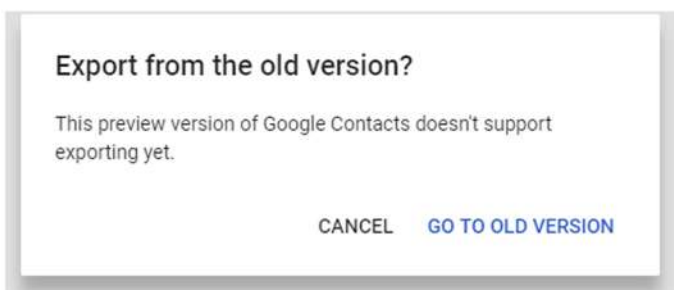
You can export a CSV file of all your address book data from Gmail.

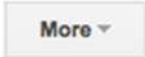
To Export your Gmail Contacts:

1. Once you login, open your Gmail contacts by clicking **Gmail** ▾ then, click **contacts**



2. Click ▾ **More** then select **Export**
 - If you are using a new version of Gmail, Gmail will prompt you to export from an older version of Gmail, proceed to "GO TO OLD VERSION"

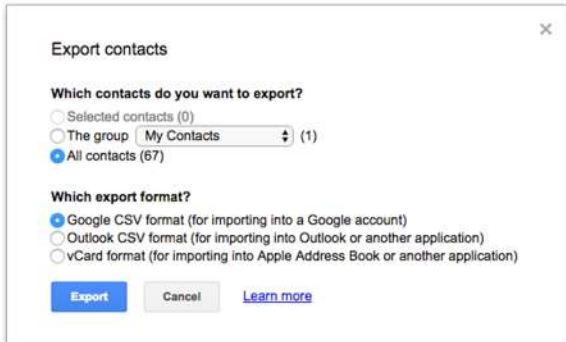


3. A new page will appear.
 - if you'd like to export specific contacts, check off the boxes next to the contact names
4. To export all contacts, do not check any boxes and click  and click "Export..."



5. A new window will appear. Select the type of contact and format of data you would like exported.

- to export all contacts, select “All Contacts”
- Select Google CSV format



Then click **Export** to download the CSV file

6. Once the CSV file has been downloaded, open the file and scroll to column “AC” for your contact’s email

HOW TO EXPORT YOUR CONTACTS

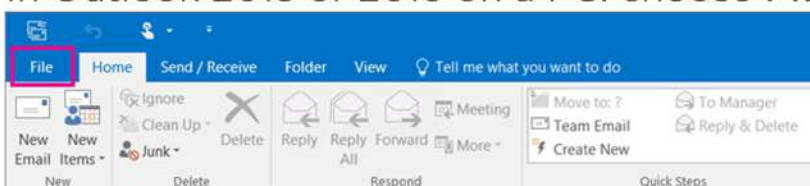
Outlook

You can export a CSV file of all your address book data from Outlook.

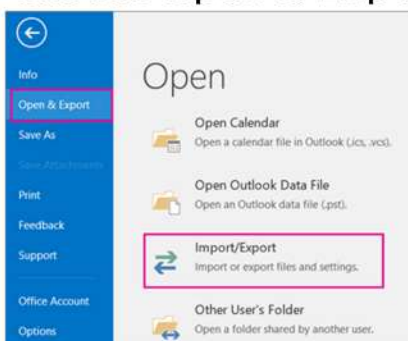
To Export your Outlook Contacts:

* for outlook 2013 or 2016

1. In Outlook 2013 or 2016 on a PC. choose FILE.

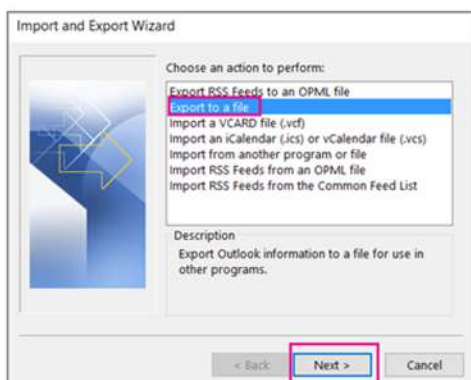


2. Choose Open & Export > Import/Export



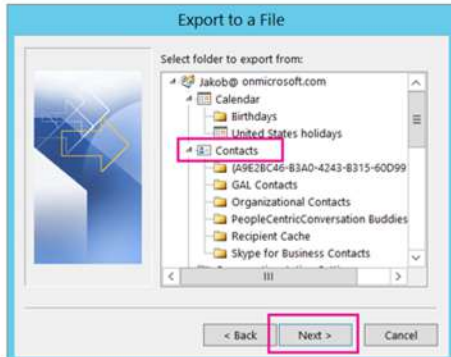
- If you are using a company email, you might require certain access to use this function
- Once you click file and you do not see "OPEN & EXPORT", proceed to click OPEN > IMPORT

3. An import and Export wizard will appear. Choose Export to a file > next.



4. Choose **Comma Separated Values**

5. Select folder to export from, click **contacts** > **next**



6. Choose **Browse**, name your file, and choose **OK**

7. Confirm where your new contacts file will be saved on your computer, and choose **Next**.

8. Choose **Finish** to start exporting your contacts immediately.

9. Once the download is complete, open your CSV file and emails can be found on column "BF"






HOW TO EXPORT YOUR CONTACTS

LinkedIn

You can export a CSV file of your connections from the Contact Settings page on the LinkedIn desktop site.

To Export LinkedIn Connections:

1. Once you login, click the  My Network icon at the top of your LinkedIn homepage
2. Click **See All** under **Your connections** on the left hand side panel
3. Click  **Manage synced and imported contacts** near the top right of the page
4. Under **Advanced actions** on the right hand side panel, click  **Export Contacts**
 - Only 1st degree connections can be exported
5. Under **Download your data**, select **Pick and Choose** and select **Connections**
6. Click **Request Archive**
 - You will be promoted to enter your password
 - You will receive an email to your primary e-mail address (within 10 minutes) which will include a link where you can download your list of connections
7. Once you receive the email, click **Download it with this link**. Then click **Download archive**

Qualifying Prospects

Because of Life's broad array of financial products and services, you'll have a great many solutions to offer a wide range of prospects. But while almost anyone with money may be a prospect for some type of financial product or service, there are two primary evaluation criteria that will help you qualify your names and maximize your efficiency: the Basic Qualifications and the Five-Star Rating System.

Basic Qualifications

Your best prospects for *any* financial sale will be persons who possess the following basic qualifications. These people...



I. Can be approached under favorable circumstances



II. Have a need for the product(s) you sell



III. Are able to pay



IV. Meet all necessary underwriting requirements
(for insurance products)

Let's look at these qualifications in more detail.

Prospect Building Process - Step 1



I. Can be approached by you under favorable circumstances.

Visualizing for a moment the ideal appointment with a prospect, we'd find the setting of the interview in a mutually agreeable location, such as the prospect's home, office or perhaps in a restaurant. The time of the appointment is mutually agreeable. There's little likelihood that the interview will be interrupted. In addition, the prospect knows your name, and that you have an idea that may be of interest. This is an example of setting up an appointment for an interview under favorable circumstances.

Along with an atmosphere of confidence and trust, the favorable interview situation helps obtain a favorable hearing of your message. It is very important to approach a prospect under the most favorable circumstances possible. Simply making an appointment to see an individual is not enough.

Even though some people are prospects for insurance or other financial services products, they may not necessarily be prospects for you. The person whom you can relate and with whom you can have a serious "heart to heart" talk provides the best potential for a sale. Of course, as you enlarge your contacts, you also will enlarge the circle of prospects with whom you can secure an interview under favorable circumstances.



II. Have a need for the product(s) you sell.

The only reason a representative should call on a prospect is to be of service, and to make the prospect aware of how to avoid a loss or gain a benefit. And being aware of people's needs for financial services helps you identify prospects. Look for people who have problems you can help solve – family income, paying off a mortgage, providing for retirement, meeting bills during periods of disability – because these are some of the primary needs for which you be able to provide ideal solutions.

To identify a need, you must know your prospect. Find out his or her objective... and focus on it. For instance, does your prospect feel it is important to guarantee an income for a dependent spouse? Is liquidity a factor in investment decisions? By knowing your prospect, you can make the person aware of a need that you can fulfill.

As you evaluate prospects, try to associate certain needs with each name. Then you will see situations which strongly indicate sales opportunities. Do not expect to find people who say they want to buy life insurance or an annuity.

Hardly anyone does...until it's too late. Look for people with problems.

Because even if these people are at first unwilling to listen, you are on sound ground if they have a genuine need for the product you sell. ("Needs prospecting" is discussed in more detail later in this text.)

Prospect Building Process - Step One



III. Are able to pay.

Obviously, this qualification is essential. But keep in mind that many people are earning substantial incomes, so don't let appearances deceive you. After paying for the necessities of life, the real problem for many people is how to wisely allocate their remaining dollars. As you expand your market and learn more about the financial problems you can solve, you will prepare yourself to "go where the money is" for larger volume sales.

Remember that a person's income usually increases over time. The young professional who buys a small policy or investment from you today will be just that much more receptive to your suggestion for business or estate planning when his or her career is established later on. Remember, too, that people inherit money, or have pools of cash from the sales of land, or a business or other assets.



IV. Meet all necessary underwriting requirements.

According to the Institute of Life Insurance, only about 3 percent of the people who apply for individual life insurance today are refused. Modern underwriting practices enable many people with physical ailments or hazardous occupations to qualify for life and health insurance.

Five Star Rating System

After you have identified people who meet the Basic Qualifications, you can qualify them even further by using the Five-Star Rating System. This system helps you judge the relative worth of the names you have according to the number of stars each name receives.

I. Standard of Living



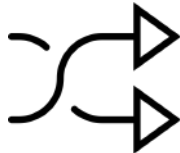
Is the prospect's annual income somewhere near yours? You will find it easier to approach and gain a favorable interview with people on your own economic level because you can more easily project yourself into their personal situation and visualize their problems. Keep in mind that your own economic level will move upward – and you will be contacting prospects at higher levels –as you progress in your career.

II. Dependents



Dependents provide a good clue to qualifying a prospect. The greater the number of dependents, the greater the potential loss that exists in the event of death or disability. Or the future need for educational funds and savings mechanisms. Keep in mind, too that single parents have the same financial needs as married couples.

III. Change



Changing situations in life create changing financial needs. These changes include such events as marriage, new home, birth, new job, promotion, or a new business. Has there been a change in the prospect's situation...or is there one imminent?

IV. Age



Generally you have more in common with people in or near your age group. Chances are you speak the same language; your friends are more likely to be their friends, and your interests are often their interests. Does the prospect's age fall within a range of about 5 year older or 5 years younger than your age?

V. Approachable



How well do you know the prospect? Can you approach him or her under favorable conditions?



What Does Each Name Mean To You?

After you have completed the qualifying process, you will be in a position to decide what to do with each name. Place each name in one of the following five groups:

1. Prospects for immediate life insurance sales.

As a general rule, your best immediate prospects will be those who appear to meet all or most of the Basic Qualifications: Approachable, Have Need, Can Pay, Can Pass. The number of stars each name receives from the Five-Star Rating System will also guide you. As you recognize immediate sales opportunities, you will feel a strong urge to call on those prospects you feel you can sell now. Ask your Manager for advice and guidance on selling to these immediate prospects.

2. Prospects for other products.

Review your names a second time, and select those which would be good prospects for other kinds of financial products and services...disability insurance, annuities and – possibly for later in your career – investments.

3. Centers of Influence.

People who may be willing to help you find new people and open new markets for you are the most valuable names on your list. Designate their names on your list with a “C”.

4. Names to set aside.

This group will include those people whom you feel are not yet within the scope of your immediate ability to serve because of their financial or social positions. In addition, it will include those people who, for the same reasons, would be unwilling or unable to help you as a Center at the moment. It will also include any names associated with nests that need further investigation and/or fact-finding prior to exploration. Also note and set aside the names of those who are prospects for financial products which you are not yet licensed or registered to sell. These names should then be reviewed periodically and re-evaluated.

5. Names to eliminate.

Finally, there will be some names that will never fit into your plans. They are referred to as “China eggs” – they will never “hatch” into prospects.

In qualifying names, you must look at the negative as well as the positive points about each prospect. If the negative points predominate, eliminate that name immediately. Also, be able to recognize and eliminate the “China eggs” or names that will never turn into profitable clients. You can waste a lot of time calling on “nice people” who will listen forever but never buy. Other prospects may meet most of the qualifications, but just can’t budget the premiums or payment. Others aren’t willing to keep a policy or a plan in force.



What Are Your “Markets”?

Your Initial Market consists of all the people who already know you: friends, relatives, business associates. These are the names you list, under the appropriate categories, in the “Identifying Your Initial Market” booklet.

Your Natural Market consists of those prospects in your Initial Market with whom you have a natural affinity. A nurse might find the medical profession to be her Natural Market. A farmer might find the agricultural business to be a Natural Market. A former Marine officer might cultivate a Natural Market among officers on a nearby military base.

Your Target Markets consist of those markets you and your Manager select for special sales effort. A Target Market could be part of your Natural Market, or it could be a new market you actively seek out and develop.

For example, you might target the owners of small stores in a large metropolitan area, or narrow it down to just grocery stores, or even further to Oriental greengrocers. By researching the problems of a specific target group, you can provide better service, win their respect, and increase your share of the market client-by-client until you are considered the insurance expert for that Target Market.

Your Market Patterns emerge with selling experience. As you begin selling, you and your Manager will detect certain patterns in your efforts and successes. It may be that, within a few months, 10 percent of your business is coming from your Initial Market, 25 percent from certain Target Markets – say, teachers – and that almost all rest is coming from referrals. Armed with such information, you and your Manager can construct an increasingly focused and effective marketing strategy.

Your Career Market is where a successful planner eventually finds the bulk of his or her business – year in, and year out. Within 3 to 5 years, most new business comes from sales to established clients, and new referrals from those clients. We call this solid, self-sustaining client base your Career Market. When you have developed a Career Market, you have arrived; you have achieved financial security through a stable business of your own making. Fresh efforts can then propel you to new and ever-higher plateaus.



Centres of Influence

In addition to their potential as customers, your friends and acquaintances may also become Centres of Influence for you.

Centres of Influence are people who:

- Are interested in your success.
- Have confidence in your abilities.
- Are in positions to know many people.
- Will introduce you to people in their circle of friends and acquaintances.
- Will provide background information to help you qualify names.
- Will lend “prestige” or “third-party influence” – they should be people who are respected by those they recommend to you.

Centres of Influence may be local businesspeople or respected members of civic or religious groups. A Centre may be a well-know personality around town, such as a school principal or teacher, a distinguished lawyer or restaurant owner. The individual might be the owner of a business you frequent, a leader in community affairs or the pastor or rabbi of your congregation.

A Centre can be excellent source of names and qualifying information. Even more important, when you use the Centre’s name as introduction while meeting people, it will help establish their confidence and trust in you.

How many individuals did you list in the “Project 100” booklet who might qualify as potential Centres? Are they sufficiently interested in your success to help you? In the “Referred Leads” section of this assignment, specific techniques for developing this source of prospects will be presented.

Nests in Your Initial Market

A “nest” is a group of people with whom you have a special rapport – some of the people within the group know something about you, and you know something about them, May be you are personally acquainted with only a few people in the group, but you can expand your contacts within the group through those people you do know. Any group of people that has a common interest represents a nest. Again, the important idea in developing nests is that people know something about you – enough to help them have confidence and trust in you. The planner who successfully develops nests builds prestige within the group, feels at home with the people in the group and secures valuable word-of-mouth referrals.

What business firms, social, civic, religious or fraternal groups have you listed in “Project 100” as potential nests? Are you know in another industry or occupational group where you “talk the language” of the people within the industry or group?



Nests As Market Segments

Many Salespeople take advantage of the “nest” concept...but expand it to help them fully develop their potential in specific market segments.

Suppose, for example, that you are a former high school teacher. Your initial nest might be the school where you taught. (Other teachers of the same subject...teachers of other subjects...then school administrators...support staff...parents of students...and so forth.)

But once you’re known and experienced, you can expand *beyond* this market nest. To personnel at other high schools, Elementary schools, Private schools, Junior colleges, Colleges and universities, And soon, you become the financial services “expert” for the entire education market segment.

Converting “Names” To “Prospects”

So far, the initial survey of your natural market has included the preparation of detailed list of the many people you know, what you know about them, and potential Centers and nests that may be sources of names for you.

But remember, although every sales starts with a name only represents a “maybe”

The next step, qualifying each name to see if you have a prospect, provides the basis for identifying the people with whom you can spend your time in the most profitable manner.

Prospect Building Process - Step 2



Telephone List				
Date: _____, 20 ____				
Name	Telephone Numbers		Situation or Referral	Result
	Bus.	Res.		
1				
2				
3				
4				
5				
6				
7				
8				
9				
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11				
12				
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14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				

Telephone contacts _____

Appointments _____

* A new telephone list must be prepared every working day. New referrals should be listed first and then other names in order of quality.

* All telephone numbers should be listed before you start.



Telephone List

Date: _____, 20 ____

Name	Telephone Numbers		Situation or Referral	Result
	Bus.	Res.		
1				
2				
3				
4				
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25				

Telephone contacts _____

Appointments _____

* A new telephone list must be prepared every working day. New referrals should be listed first and then other names in order of quality.

* All telephone numbers should be listed before you start.

Identifying Your Initial Market

A Market Identification Guide

Making a Critical Habit

Asking for introductions is a **critical habit to acquire**. Like all other habits it is acquired by doing. Like all other habits, it is maintained by continuous use.

You can ask for introductions any time. Some of the obvious times are:

- From a client when the application is written
- From a client when a policy is delivered
- From a prospect who does not buy but appreciated your presentation
- After just meeting a prospect for the first time
- When working with a Center of Influence
- When developing a nest of prospects

In asking for introductions, there is no right way to do it; there is no wrong way to say it. Asking for introductions is a very personal thing. You can be lectured to, observe demonstrations, and role play for hours on the best methods to ask: yet it won't make a bit of difference until you have made the personal commitment to make asking for introductions into a habit.

There is a great void between knowing and doing in asking for introductions: between the principles and the habit. Give a planner, old or new, a written quiz on prospecting and that planner will pass with flying colors. Most planners know exactly what they should do and how it should be done. They know exactly how to ask for referred leads, but they haven't acquired the habit of doing it.

A little knowledge and a strong habit of asking for referred leads is far more productive than a strong knowledge and a little habit.

The Problem Is In The Doing, Not In The Knowing.

*"It Is Acquired By
Doing; It Is
Maintained By
Doing"*

The Value of Introductions

An introduction is not only a name. It also qualifies the individual as a potential buyer. It includes an introduction or permission to use the name of the person who has furnished the referral.

A referral is the name of a person given to you by a prospect, client or friend. They give you the referral because they have a relationship with the individual and they believe you can do a good job of helping the person with the products and services of HUB Financial Inc. It may be a friend of theirs, a relative, a business associate, or someone who they participate with in a community activity or on a committee.

Referred leads are the best and most satisfying method of prospecting. Statistics have shown that you will be able to get more appointments and close more sales with referred prospects than with prospects from any other source. Referrals are so effective because they provide the sales representative with far more than a name. They provide four distinct advantages:

1. Prestige.

When sales representatives approach prospects, they are received as referrals, they take with them the borrowed power and influence of the person who made the referral. If a manager refers you to someone who works for her, the employee will tend to feel that if the boss thinks well enough of you to refer you, your advice must be worth listening to. The same kind of prestige goes with almost all introductions.

2. Trust.

Suspicion is one of the obstacles that must be broken down in your initial approach to a prospect. When you are making cold calls on people who don't know you, they are often reluctant to listen to you and to trust you and they are quick to say, "No". On the other hand a referral who meets you through someone they already know and trust is willing to have an open mind and listen to you.

3. Qualification.

The person making the referral can tell you the information you need to qualify each name. Be sure to ask about occupation, residence, age, income dependents, special interests and how they know each other.

4. Needs Awareness.

Prospect needs are the keys to appointments and sales. In many cases people giving you an introduction are able to tell you something about the people whose names they are giving you – a situation in their company or an event in their family life – that will alert you to a specific need the prospect would have for your products and services. By mentioning your success in handling needs similar to theirs when you phone for an appointment, you greatly increase your chances of getting the appointment.

Many successful HUB Financial Inc. planners have chosen referral prospecting as the way to build their professional financial services practice. The people who give you referrals enjoy helping you, particularly if you get back to them to let them know what happened.



Telephone Approach to Someone You Know

HELLO _____ THIS IS _____ CALLING.

(typical social talk)

ACTUALLY THE REASON I AM CALLING IS BECAUSE I HAVE JUST STARTED A NEW CAREER IN FINANCIAL SERVICES WITH HUB FINANCIAL INC.

I WAS JUST HOPING TO MEET WITH YOU FOR 15-20 MIN TO SHOW YOU HOW I WORK AND THE KINDS OF SERVICES I OFFER SO THAT IF YOU COME ACROSS SOMEONE WHO MIGHT BE INTERESTED MY SERVICES YOU WILL FEEL COMFORTABLE INTRODUCING ME.

WHAT TIME WOULD WORK BEST FOR YOU.

Make sure to print off any materials you are going to use when on the phone. Looking at your computer can easily distract you during the phone call.



GOOD TIMES TO CALL

Category of Prospect	Usually Good Times to Call	In My Experience Good Times to Call
Druggists	1 to 3 p.m.	
Executives	Between 10:30 a.m. and 3 p.m.	
Garage workers	Early afternoon(early week)	
Garden center employee	Midweek	
Grocers	1 to 3 p.m.	
Housewives	10 a.m. to 2 p.m.	
Lumber yard workers	After 8 p.m.	
Movers	4th to 8th month or 17th to 22nd	
Newspaper personnel	Early p.m. in office or mid-p.m. at home	
Nightshift, superintendents	4 p.m.	
Personnel directors	Early in midmorning	
Photographers	Midmorning	
Printers, publishers	After 3 p.m.	
Purchasing agents	First thing in a.m. except Mon. and Fri	
Radio and TV announcers	Listen to station for off-air times	
Real estate agents	Midmorning, midweek	
Retail store managers urban suburban	Half hour before opening Noon	
Supermarket employees	Tuesdays or Wednesdays	
Surgeons	Mid afternoon	
Teachers	After 3 p.m.	
Theater owners and managers	Before 2 p.m.	
Wholesalers	Before 10 a.m. or Saturday morning	
Adjusters	9 to 11 a.m.	
Advertising Executives	After 3 p.m.	
Architects	Late afternoon	
Artists, commercial	2:20 to 3:30 p.m.	
Assistant personnel Directors	Early afternoon	
Attorneys	Before 10 a.m. or after 4 p.m.	
Auditors (CPAs)	Between the 12th & 20th of the month	
Bakery employees	Late afternoon	
Bankers	Before 10 a.m.	
Beauty parlor operators	Tuesday or Wednesday	
Bowling alley	Midmorning	
Brokers	Before NY Stock Exchange opens	
Builders	Late afternoons on the job or 7:30 a.m.	
Chefs	1 to 3 p.m.	
Chemists	Late afternoon	
Clergy	Midweek	
Commission merchants	After 2:30 p.m.	
Construction workers	Noon at lunch break or late afternoon	
Convalescent home personnel	1 to 3 p.m.	
Dairy superintendents	Late afternoon	
Dentists(check for days off)	Before 10 a.m.	
Department store personnel	8:30 to 10 a.m.	
Dieticians	1 to 3 p.m.	
Doctors (check for days off)	11 a.m. to 1:30 p.m.	



SAMPLE Centre of Influence (C of I) Talk

The reason I wanted to meet with you is because I've just begun a new partnership with HUB Financial and I want to change my philosophy on how I do business. You see, I don't want to be known as someone who sells a product.

I don't want to be a salesperson.

I want to focus on the reason that I entered Financial Services in the first place, and that was to help people.

I want to focus on helping people.

2 years ago I was invited to an information seminar in regards to Financial Services. During the seminar it occurred to me that there was an enormous benefit to taking care of your finances at a young age.

However, as you probably know, I've found that the majority of young adults are either a) never approached, by typically older financial advisors, until they are in their late 30's or early 40's or b) they are simply not given the proper time or attention that they need in order to make a decision. Either way, the end result was the same and that was that the majority of young adults missed out on the advantages of starting young.

I wanted to be different.

I realized that I could be the one to approach young adults and provide them with the opportunity to take care of their finances at a younger age. So I began my training and career in Financial Services determined to make a difference...by helping young people help themselves. I say that because I believe that I can help young people by asking them questions that they would otherwise ignore.

I believe that young adults should meet with me because of the fact that I can motivate them to sit down and ask themselves some very important questions regarding their finances. You see, everyone has good intentions. However, the majority of good intentions never materialize because the majority of people are never presented with the opportunity to follow through with them.

I want to provide young adults with this opportunity.

The opportunity to take care of their finances at a young age and reap the rewards.

I relate to young people because I am in the exact same situation. And that is why I enjoy doing what I do. I love helping people and I can help people, who are just like me, by asking them the questions that they need to ask. That's my philosophy and that's what I want to be known for.

○ ○
○ ○ **I want to be known for helping people.**
○ ○

○ ○ I do this by meeting people for 15-20 minutes and introducing myself and the services I provide. I
○ ○ then ask them to fill out the “Simple Conversation” Brochure.
○ ○

I do this because it is the most efficient way for me to show them the services that I offer and for me to get a better idea of what they’re interested in. From there we decide whether or not we should build a business relationship together. Perhaps our personalities clash or perhaps they are well taken care of by another financial advisor. But that’s fine.

Because I’m not trying to sell them anything.

You see, I only want to introduce myself to people and let them know that I can be a resource for them if they were to need any of my services at a future time.

I just want to give them an opportunity to do business with me.

If they do want to do business, that’s great. Then together we could work something out that fits comfortably in their budget.

If they don’t, that’s fine too. At least they’ll know what I do and that I’m there if they need me.

You see, I’m only compensated through commission.

However, unlike most commission jobs if my clients were to change their mind... I would lose my compensation.

That means that I only benefit by doing what’s right for my clients.

I’m not interested in providing services to people who don’t need it.

I want to help people...not disturb them.

So with that in mind, do you feel comfortable with how I approached you?

I’m looking to introduce myself to people between the ages of 20-35 that have finished school and have a steady job. And I would approach these people in the same manner I approached you.

Who do you know that I might introduce myself to so that I can give them the same opportunity you had?

(Take Names)

Would you mind filling out the “Simple Conversation” Brochure?



A Sample C of I Talk in Action

Hi Tony, so what is it that you do?

I work with families to help them realign how they spend their money in order to protect what matters most to them. Basically I provide them with methods to succeed.

What does that mean?

I am glad you asked. Do you know how we all seem to be extremely busy being busy? The world comes at us at an alarming pace and we get distracted by both external and internal noise. There is also a lot of pressure placed on household incomes as a result of desire based spending. People simply trying to keep up with the latest and best of everything. However, when I sit down with someone and ask them what the most important thing in the world is to them, the response is usually their spouse and children. Through the Methods process, we look at how they currently spend their money then determine a comfortable amount that can be set aside to eliminate their biggest concerns and facilitate their dreams.

How do you start?

I like to meet people for a 15 minute introductory meeting in order to have a SIMPLE CONVERSATION. In this meeting we establish what is important to them as well as specific items that they would like to discuss. Basically, it's about them, not me. If we establish areas of interest and concern, we set a second meeting to begin the Methods process that I just described.

What if they aren't interested?

If through our simple conversation we do not arrive at any areas that I can help or I find that they are in a great position as far as protecting what matters most to them, I will ask them if they would like me to touch base with them at some time in the future to check in on them. If not, I like to ask if there is anyone that they would like to introduce me to so I can again have the simple conversation to see if my services can possibly help another family. Sound reasonable?



Developing Your Networker Talk Worksheet

The questions you need to answer:

1. Why am I in the business? (Why career change? Why you? Response to a need in the market)

2. What is your business philosophy?

3. Why people should deal with you? (The logical/emotional who to your why)

4. Who is on your team? (Shore up your weaknesses)

5. How do you work with clients? (Process - reducing risks and increasing the value)

Prospect Building Process - Step 4

- ○
- ○
- ○
- ○ 6. How are you compensated? (General overview and defense when necessary)

7. What tools or results would you like to demonstrate? (Reduce risk and increase value)

8. What is the desired result of the interview? (Min of 5 introductions)

9. What will be the follow-up procedure? (Confidentiality)

10. Ask for Introductions. (Do)

Take the key points you uncovered and create your motivational story tailored as necessary to relate to the specific centre you are meeting!

