

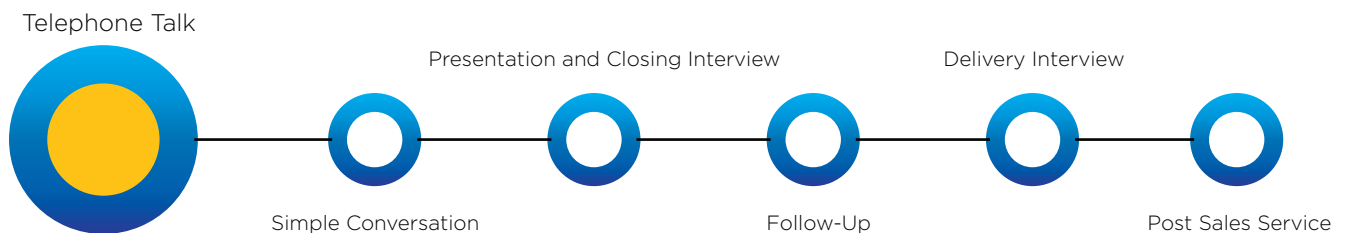
Approaching New Prospects

This Session:
The Telephone Approach

Pre-Session Work:
Review, Create and Practice your C of I Approach

Goal:
Book One Face to Face Appointment per 2-3 Calls
Apply principles learned for the telephone approach to other forms of media approaches (text, email, SM Platforms, etc.)

The Client Building Process



Client Building Process

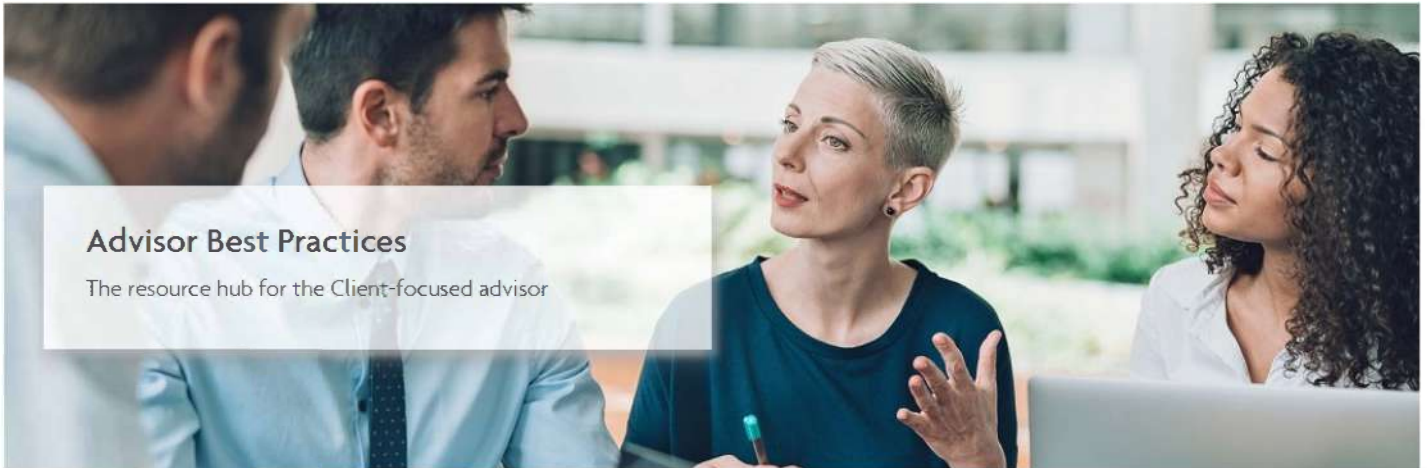


Step		Learned	Practiced	Mastered
1	Make Appointments with Introductions			
1.1	Digital Approach: Email, text or SM platform pre-approach			
1.2	Telephone Approach: Talk to an Introduction/Referral			
2	The Simple Conversation Interview (20-30 Minutes)			
2.1	Build rapport – adapt to a personality profile			
2.2	Introduce “Simple Conversation”			
2.3	Have prospect complete “Simple Conversation”			
2.4	Review “Simple Conversation” – ask probing questions to amplify answers and clarify potential needs			
2.5	Make a decision (single needs/planning/follow-up/discard)			
2.6	If the prospect is qualified and all decision makers are present, ask for permission to continue with the Client Building Process or set the next appointment date as soon as possible			
2.7	Give the prospect Third-Party Articles or general information related to areas of interest			
2.8	Ask for Introductions – use “People We Would Like to Meet”			
3	Presentation and Closing Interview (2-3 Hours)			
3.1	Methods Power Point Presentation			
3.1.1	Introduction to the “Methods Process”			

3.1.2	Commitments to verbal engagement Ideally have disclosure, privacy forms complete			
3.2	Complete Planning Questionnaire and Financial Information			
3.3	Go through "Methods"			
3.3.1	Identify your Goal			
3.3.2	Financial Priorities			
3.3.3	Prioritize Risk Management & Wealth Management Allocation			
3.3.4	Work through Needs starting with Risk Management Areas			
3.4	Do need specific presentation			
3.5	Show alternative solutions			
3.6	Help client make decision			
3.7	Complete paper work and collect initial premium			
3.8	Give client Medical Preparation Checklist			
3.9	Ask for Introductions/Referrals			
4	Follow-Up			
4.1	Order medical requirements			
4.2	Submit Application complete with Cover Sheet and Illustration			
4.3	Set weekly follow-up (Data Base/Case Coordinator)			

4.4	Optional: Send post-sale "Thank You" card			
4.5	Contact client if process taking longer than anticipated			
5	Delivery Interview			
5.1	Review "Methods"			
5.2	Review reasons for coverage			
5.3	Review "Needs Analysis"			
5.4	Review "Solutions and Options"			
5.5	Confirm client satisfied with current solution			
5.6	Review "Financial Priorities"			
5.7	Review checklist (<i>next need to solve</i>)			
5.8	Set follow-up (<i>next appointment</i>)			
5.9	Use proactive prospecting method to obtain Introductions/Referrals			
6	Post Sales Service			
6.1	Set up your preferred CRM			
6.2	Categorize client and set service level			
6.2.1	When to call back and why			
6.2.2	Birthday Cards			
6.2.3	Policy Anniversary List (<i>follow-up</i>)			
6.2.4	Age Change Contact			
6.2.5	Newsletters			
6.2.6	Referrals			
6.2.7	Other			

THE DIGITAL APPROACH



Advisor Best Practices

The resource hub for the Client-focused advisor

Everything you need to grow – all in one place. Access more than 100 videos, articles, guides and tools to help build your practice on all levels. Stay ahead of industry disruption and turn prospects into Clients for life.

Business building

Marketing yourself

Client engagement

Professional insights

Marketing yourself

Carve out your niche. Attract your ideal Clients by showing them what

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Carve out your niche. Attract your ideal Clients by showing them what makes you stand out.

Video Marketing

Gain a competitive edge, by highlighting your greatest marketing asset – you.

Leveraging LinkedIn

Use the power of your LinkedIn presence to increase exposure, stand out, and connect with Clients and prospects.

Partner Kit

Use a range of videos on key financial topics and strategies to add your own customized details and expand your reach to clients, prospects, and centres of influence using video marketing.

Email Marketing

Stay top of mind with Clients and attract new prospects with compelling email marketing campaigns.

Connecting through Webinars and Seminars

Build your reputation as a trusted source for information through hosting value-add Client seminars – either in-person or online!

We Help. YOU GROW.

QUESTIONS?

Contact us at
sbd_programs@sunlife.com



Client Building Process - Step 1



THE TELEPHONE APPROACH TO AN INTRODUCTION

HELLO (*Mr. Prospect*) IS THIS A CONVENIENT TIME TO TALK? (*Mr. Prospect*)
DID (*Referrer*) MENTION THAT I MIGHT BE CALLING?

I AM CALLING BECAUSE I UNDERSTAND THAT YOU RECENTLY
(*Changed situation*). CONGRATULATIONS!
I AM AN INDEPENDENT ADVISOR WITH (*hold out name*)

I WORK WITH A LOT OF PEOPLE LIKE YOURSELF WHO HAVE BEEN
INTERESTED IN THE SERVICES I OFFER. (*Firm up this benefit statement based on
who you are calling, relating to knowledge of the market*)

I REALIZE THAT YOU ARE BUSY AND THAT IS WHY I AM
CALLING TO FIND A CONVENIENT TIME FOR US TO MEET FOR 15
OR 20 MINUTES SO THAT YOU CAN DECIDE IF SOMETHING
MIGHT BE OF INTEREST TO YOU.

IN YOUR LINE OF WORK ARE MORNINGS OR AFTERNOONS BETTER FOR
YOU? (*Ask a question that relates to the habits of people in the market. Ex. Do
you take lunch? or Most nurses I work with begin their shift at X, how about we
meet before at Y time at Z place*)

WOULD TUESDAY AT 10:00 OR WEDNESDAY AT 9:00 BE BETTER?

I LOOK FORWARD TO MEETING YOU AT YOUR OFFICE

AT 1050 W. GEORGIA AT 10:00 AM TUESDAY, JANUARY 15TH.

Client Building Process - Step 1

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 N.Y. 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.	

Alternative Phone Talk

Hello (Mr. / Mrs. Prospect), is this a convenient time to talk?
(Mr./Mrs. Prospect), did (referrer) mention that I would be giving you a call?
I am calling because (referrer) mentioned that you recently (change in situation).
Congratulations!

Let me introduce myself. I am an independent advisor with (*hold out name*) and I work with a lot of people like yourself to both assist in creating wealth while at the time same time eliminating risk along the way. I do this by helping people realign their financial expenditures with their core values.

OPTION A: Prospect asks “What does that mean?”

Well most of us have a habit of paying for “stuff” far ahead of putting money aside to grow our nest egg and protect the things that are truly important to us like our families. I have a process that allows us to sit down and accomplish these goals in a very simple manner.

OPTION B: Prospect says nothing

I realize that you are busy and that is why I am calling to find a convenient time for us to meet for 15 or 20 minutes to allow you to decide if my services might be of interest to you.

In your line of work are mornings or afternoons better for you?

Would you prefer Tuesday at 10am or Wednesday at 9am?

Perfect, I look forward to meeting you at your office at (state location) at 10am on Tuesday January 15th.

Advisor Goal:
Try to use Telephone
Approach to an
introduction to book 10
meetings per week.



My Own Telephone Approach



Steps & Elements	Your Telephone Approach
<p>Opening</p> <ul style="list-style-type: none"> • Introduce yourself and the company • Build rapport / supply the link 	
<p>Create Interest in the Appointment</p> <ul style="list-style-type: none"> • Say what you would like to do • State a benefit to the prospect 	
<p>Request the Appointment</p> <ul style="list-style-type: none"> • Offer alternative dates and times 	
<p>Confirmation and Conclusion</p> <ul style="list-style-type: none"> • Confirm the date and get directions • Collect additional information • Thank the prospect and give him/her a way of contacting you 	