



LeadingResponse

BETTER PROSPECTS. BETTER RESULTS.

## Top Producer Playbook:

Seminar Consulting & Advisor Execution

# Building a Relationship Early On

- Building a relationship starts immediately after the reservation is made.
- Client or preferably the client's staff should call and thank that person for taking the time to place a reservation and should let them know they look forward to meeting them at the event.
- That same person should call and confirm attendance at the event a few days before.
- TIP – To help increase return calls to voice messages, suggest to your client to say the reason for their initial call is to collect menu selections for the upcoming event.
- TIP – Suggest to your client to request permission to issue text message alerts/reminders about the event.

# Building a Relationship Early On

- Have the same person who called to say “thank you” and that performed the reminder/confirmation call work the registration table.
- Be friendly and accommodating. Welcome people to the event.
- Set up a small registration table outside the room.
- Use name tags.
- Have additional staff available to help walk people to their tables and introduce them to other attendees at their table.



## *Real life relatable scenario:*

Use example of attending a party and not really knowing anyone there other than the person that invited you. Most people in this situation will immediately gravitate toward that person so they feel secure. That person at your event is your staff member who has been in contact with them throughout the entire process.

# Make it an Event and an Experience.

No one likes boring lectures, but virtually everyone enjoys fun and entertaining experiences.

- Break up the silence by having music or videos playing when people enter the room. Compare this to trivia, commercials, factoids and trailers at the movies.
- Learn about your prospects and use it to engage other attendees. This creates conversation among attendees and most importantly makes people comfortable.
- Consider possible negative perceptions and make them positive, e.g. alcohol.
- Demonstrate you care. Choose tables that are near the back of the room and near the entrance. Place a handicap placard on the table and tip the chairs forward. As the event fills up you can remove the placard, however this serves two purposes. One, to accommodate handicap seating, however it also encourages people to sit at the front of the room.

# #1 Key to Success

Set appointments at the event!

# #1 Reason for Failure

**NOT** setting appointments at the event!

# Additional Techniques for Success

Start with the end goal in mind.

Develop your presentation, always keeping that final outcome in mind

Have someone else introduce you. An estate planning attorney or CPA is a great resource for this.

Open the event and set the evening's agenda

Keep it simple – Cover only 3 or 5 core topics

Use the “stage” to categorize topics and make your point (blocking)

Use props and/or images to help people remember things

Be yourself... be authentic

Tell the audience what to expect throughout

Get ‘em writing early and often

If you use PowerPoint...Make sure to “do” the PowerPoint and not the other way around

Avoid complex financial jargon and acronyms. You want people to be comfortable and understand your presentation.

# Appointment Technique #1 – Direct Close

Offer “help” instead of calling it a meeting or an appointment.

You and your staff work the room after the presentation and schedule appointments before/during the meal.

Make sure to pay close attention to body language and approach the most open and welcoming person first.

Instead of answering questions during the event, use a risk assessment guide, workbook, or questionnaire to schedule more appointments.

Tell people it’s okay to say “no.”



# Appointment Technique #1

Use the alternative close technique when offering dates/times.

If people tell you they don't have their calendars then ask for a telephone appointment when they'll be in front of their calendar. A small commitment is better than no commitment.

Getting people to publicly state or commit to anything/something greatly increases the odds of that commitment becoming true.

Follow up after the event with a call the next day. "Thanks for attending the event Mr. Jones. It was a pleasure meeting you and Mrs. Jones. So we've been hosting events for quite some time and we find that most people have questions that they're too afraid or nervous to ask during the event. So with that in mind, when you left the event and got into the car with your spouse/significant other, what questions came up?"

# Appointment Technique #2 - Curriculum

Use your dinner events to sell an ongoing course/curriculum.

Offer people who prefer the comfort and safety of a group setting another, yet smaller, group setting to meet with you and/or specialists you work with, e.g. CPA, Estate Planning Attorney, insurance agent, etc. at your office for lunch.

Gets people to visit your office without feeling threatened. Once they've been there once, they'll be more comfortable to come back in the future.

TIP – Plug the curriculum throughout your presentation and talk about the specialists involved. This creates the perception that your firm is larger than it really is and also generates a feeling of assurance for the audience that EVERYTHING is being considered as you review their retirement strategy.

# Appointment Technique #3 – Assumptive Close

It should be noted that this technique takes a special personality to pull off.

Using the RSVP portal, pull up your registrants and assign appointment dates and times BEFORE you host the actual event. Print these out and insert them into the risk assessment guide, brochure, workbook, etc. that you use during the event.

This is where it gets delicate... Now it's time to tell everyone that you've already scheduled appointments for them and you're going to move to the "close." This needs to be positioned with them in this way. "So hopefully you learned some insightful information that you can take back and apply to your personal situation. We've been able to help hundreds of people here in Tampa and are tremendously busy serving our community. It's for this reason along with the fact that each person in attendance tonight is extremely important to us, that we've gone ahead and allocated time for each of you within the next 10 days to take advantage of our no cost, no obligation second opinion review. If you'll open up your folder, you'll find a date and time inside. If for some reason this doesn't work for you or you have a scheduling conflict, please get with [Assistant Name] during dinner and we'll do our best to arrange a switch with someone else in attendance tonight. If you have questions, we'll be around for a few minutes afterwards to talk before we leave you to enjoy dinner."

Thank you for reading!



LeadingResponse

BETTER PROSPECTS. BETTER RESULTS.