“How To Win More Clients?”

Become the Preferred Advisor for Your Prospects & Strategic Partners

Facilitated by Joe Micallef – Grow UP Sales Consulting

Association of Insurance & Financial Advisors - Nebraska

22 September, 2020

WHY?

WHY do you do what you do?
WHAT are your Personal & Professional Goals? What makes you HAPPY?

WHY would you NOT achieve your Goals?
What challenges and concerns are LIMITING your success?

WHAT?

WHAT are your SPECIFIC TARGETS (Clients and Referrers)?
What CRIMES, CRISIS and CONCERNS do you help solve?

WHAT is your COMPELLING STORY?
WHAT are your “Super Powers”?

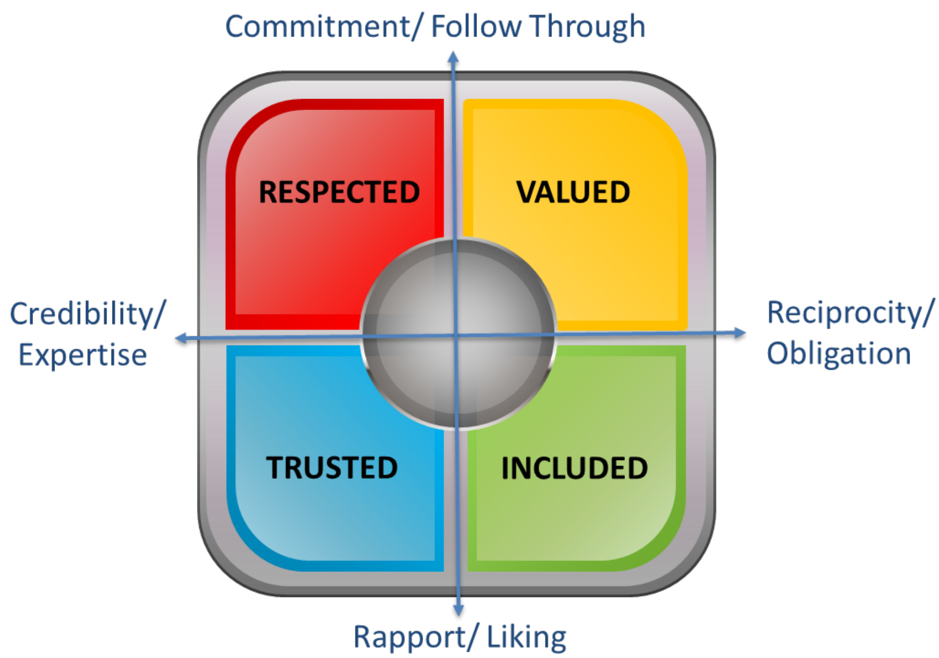
HOW?

HOW will you ENGAGE your Targets?
List ACTVITIES and SUPPORT.

HOW will you PERSUADE your Targets?
List PROCESSES and TOOLS.

HOW will you RETAIN and LEVERAGE your Targets?
List ACTIVITIES and SUPPORT.

RELATIONSHIP SCORECARD – How strong are your relationships?	
Name:	**Date:**



RAPPORT / LIKING SCORE 1 – 10

How can you improve this score?

CREDIBILITY / EXPERTISE SCORE 1 – 10

How can you improve this score?

RECIPROCITY / OBLIGATION SCORE 1 – 10

How can you improve this score?

COMMITMENT / FOLLOW THROUGH SCORE 1 – 10

How can you improve this score?

MEETING PROCESS - PREPARATION WORKSHEET

CLIENT & DATE:

PREPARE	ACTIONS / NOTES
1. OUTCOME FOCUS Have a SPECIFIC Focus. Consider outcomes before action.	• What type of Meeting is this (FIRST or PROGRESS) and what is your specific objective?
2. HAVE A CREDIBLE REASON <u>Weapons of Influence:</u> Liking, Reciprocity, Authority, Social Proof, Scarcity, Proximity	• Consider 1 - 2 Compelling Stories to Engage Client.
3. BUILD RAPPORT & CREDIBILITY Zone of Trust = Rapport Score + Credibility Score	• What is your Zone of Trust score? • How do you improve?

MEETING PROCESS - PROPOSE WORKSHEET

PROPOSE	ACTIONS / NOTES
4. EXPLORE & LISTEN Pre-Determine Broader Needs and Questions. Gain Permission to Ask. Listen for Cues.	• Pre-Determine Client's Broader Needs. • What questions can you ask?
5. GAIN PERMISSION TO OFFER A SOLUTION Confirm Client's Needs. Gain Permission to Help. Be a Trusted Adviser.	• Script how you would gain permission to offer a solution.
6. OFFER SOLUTION Predetermine Solution. PRACTICE your Valuable Solution. Create Quality Proposals.	• Predetermine Solutions for Client's Needs. • How will you Deliver / Document?

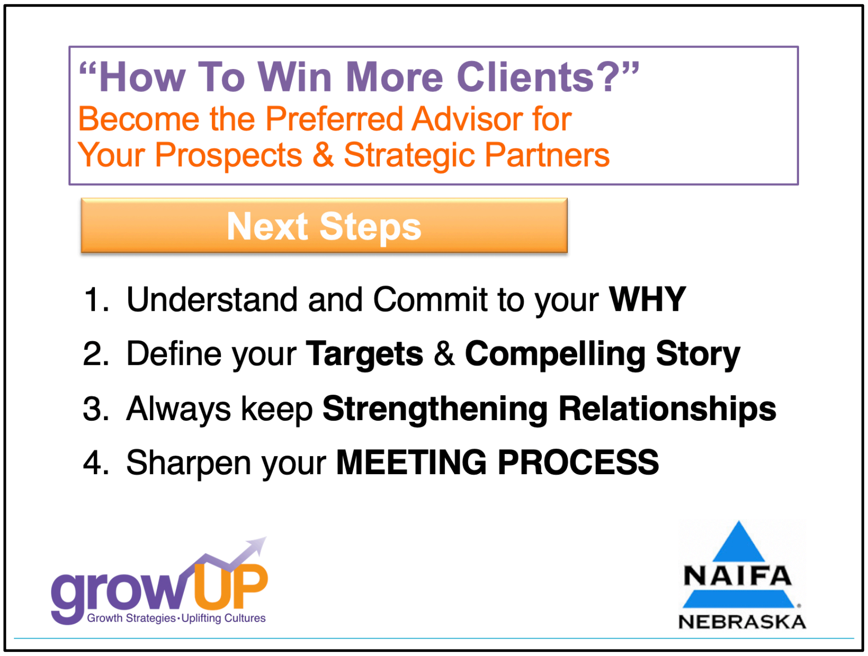
MEETING PROCESS - PROCEED WORKSHEET

PROCEED	ACTIONS / NOTES
7. ASK FOR THE OUTCOME Confidently Ask. Assume Interest & Willingness to Proceed.	• Script how you would specifically ask for an outcome. • Identify & Challenge Limiting Beliefs.
8. HANDLE OBJECTIONS <u>Strategies:</u> Hypothetical Reframe Park It Utilize Objection Social Proof Feel, Felt, Found Question It	• Predetermine Objections / Prepare Responses
9. SECURE NEXT STEP Know Your Next Steps. Make it Easy. Diligently Follow Up.	• Identify Potential Next Steps. • Script how you would specifically propose Next Steps & Follow Up.

MEETING PROCESS – POST MEETING NOTES

Review meeting notes and identify **WHAT WORKED** and **WHAT DID NOT**.
Ask yourself WHY.

Clearly outline next steps/actions with specific timeframes.



For Further Information & Support

Contact: Joe Micallef
Sales Strategist and Success Coach

joe@growupsales.com
773 329 0066
Grow UP Sales
www.growupsales.com