RELATIONSHIP

MARKETING

Training Manual

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Relational Marketing
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Relational Marketing Overview

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Marketing is tough these days. Dinner seminars are getting harder by the year. Your prospects can go to a seminar for lunch and dinner on just about any day of the week throughout the year. Radio, TV and internet marketing are changing the landscape of prospecting to the general public. Yet, are there other ways to maximize the dollars you spend on marketing? Do you know how all your marketing dollars work together to accomplish the maximum impact for your company? Are you creating both the volume and quality of prospects you need to grow your practice? Is it possible to create a "word of mouth" epidemic about your practice in your community?

The answer is yes. Listen to Dale, the top producer for not only his Broker Dealer, but for one of the largest variable annuity carriers in the country. He says, "Last year I did 40 prospecting seminars. This year I did 8 seminars and cut my costs in half while doubling my production." Dale discovered the power of relational marketing. He found a tremendous way to layer on marketing strategies that exponentially increase the effectiveness of each one separately. That power comes from creating partnerships with some of your best clients.

Creating Client Partners is radically different than asking for referrals. Your clients do want to refer you. The problem is they hate to be asked. It's a lot like the old saying, "I love to buy, but hate to be sold." If you are still asking for referrals, you look like every other salesman out there. The typical salesman says, "You know, I get paid in two ways…." and the pathetic line goes boorishly on. Asking for referrals is akin to still being on dial up for the internet. Stop asking for referrals and start developing Client Partners.

"Tipping Point" by Malcolm Gladwell

Relational marketing creates a "word-of-mouth" movement of prospects to your office like none other. One of the best books to speak to the idea of creating a fever in a community by word-of-mouth is *"Tipping Point" by Malcolm Gladwell.* Gladwell looks at the study of epidemiology and applies it to marketing strategies. Much like a disease, a "word-of-mouth" epidemic comes to a "tipping point" when the wave of business tips in one direction or another; either a total bust or an outbreak of new qualified prospects at your door. What are the factors in creating that "tipping point"? Gladwell outlines three: The Law of the Few, the Stickiness Factor, and the Power of Context.

The Law of the Few says that there are very small numbers of individuals who have the innate ability to infect a community with a message, (hopefully your message). The few are defined as connectors, mavens, and salesmen.

Connectors are those few people who seem to know everybody. Not only do they know everybody, they are connected to various groups that aren't typically connected to each other. They are the masters of the "weak-tie" with a large number of people which make them a key infection point. The word maven is a Yiddish term meaning knowledge. Mavens are people who love information, have an abundance of it on a wide range of topics and love to give it away. They are sought after in the community for their information and enjoy helping people with what they know and the more information needed on varied subjects, the better.

Salesmen are those few with the unique ability of persuasion. Gladwell says, "…there is also a select group of people – salesmen – with the skills to persuade us when we are unconvinced of what we are hearing, and they are as critical to the tipping of word-of mouth epidemics as the other two groups."

In a word-of-mouth epidemic, Gladwell says, "Mavens are data banks. They provide the message. Connectors are social glue: they spread it." Salesmen have the power to persuade us. All three get *emotionally fixed* by connecting, giving information, or selling. In other word, part of their life agenda, what drives them is using their innate temperament skills to help people accomplish their goals. All are keys in "tipping" a word-of-mouth epidemic.

The Stickiness Factor relates to the message we disseminate in a community. The message must have some glue to it. It must be easily remembered and carry a strong call to action.

The Power of Context is the reality that it's not large things that are important in creating a word-of-mouth epidemic, but it's the infinitely small things that matter. Two areas of context that Relational Marketing utilizes is the power of small groups and small consistent messages to clients.

"Referral of a Lifetime" by Tim Templeton

Many advisors believe that relational marketing is only for those gregarious individuals who are outgoing and make friends easily. Nothing could be further from the truth. Business is relational top to bottom. Business transacts through relationships. Granted, our modern technological world has tried to redefine what a relationship is, how it begins and how it is nurtured. Yet, the reality is that in financial planning people have to sit down with each other in some capacity to develop plans that fit individual needs.

In Referral of a Lifetime, author Tim Templeton demonstrates this truth and basically outlines four business temperaments that explain how we relate to each other on a business level. The four business temperaments are outlined below:

- **Relational/Relational**: These are folks who start and end with the love of relationships. They are people-people inside and out. Somehow business just happens.

- **Relational/Business:** R/B people have an easy time developing relationships, but when the topic turns to business, they quickly get in to tactical mode.
- **Business/Relational:** B/R people may be a little uncomfortable with relationships upfront and use "business talk" as a way to get started. However, once people become their clients, the relationships are long and fulfilling. They have very loyal clients.
- **Business/Business:** B/B people are those who are not relationally motivated on the front end or the back end of a business relationship. They are business all the time and somehow relationships happen. It's wrong to think that this is not the kind of person you would want simply because of the business nature of the advisor. There are people who need financial advice that are B/B also, and the R/R person irritates them to no end!

People like those who are like them who like them, is a long established truth. We all do business through relationships no matter which temperament we are. An understanding of relational marketing and a strategy of how to best use the power of relationships is of the utmost importance to growing an effective referral business for every advisor.

Relational Marketing Techniques

The following strategies are the tools in which you can create an environment where people begin to introduce their friends to you in mass. We'll teach you how to create an environment where your client partners introduce their friends to you at a time when they are most comfortable. Agents often ask for referrals and clients have a hard time responding. The interview ends with a very uncomfortable conclusion, exactly what you don't want if you're trying to create good will in the community. Yet, if you are the person in their mind when they are talking at leisure to their friends and neighbors, you can be assured of them talking you up. Relational Marketing is the most unique strategy to date which floods your office with prospects generated from client partners who are out there working on your behalf.

Prospecting Seminars

Seminars can be a key component of Relational Marketing (RM) because of their ability to set you up as an expert in your field at a non-threatening social event. A seminar provides a context at which a prospect sees you as someone they might like to do business with and might be able to trust. Seminars are greatly enhanced by the strategies of RM with more and higher quality of prospects.

College Workshops

Adult financial education on college campuses is one of the very best ways to meet and develop trusting relationships with highly qualified and motivated prospects. The average prospect has between $500k and $1.5 million of assets and 80% to 90% make appointments. Adding your own clients and their referrals to the mix just makes these events stronger.

Client Focus Groups

A client Focus Group is a unique opportunity to create client partnerships. It is the hub of the RM marketing effort. You will receive valuable input from your clients: Information about their passions, interests, hobbies, their environment, and their openness to partnering with you. You will learn how to invite your "A-B" clients to a Focus Group luncheon or dinner, telling them you value their input, and want them to help you grow your business with people just like them.

The time frame of a Focus Group is about 2 hours, with lunch/dinner provided. For the first hour you will be asking questions and getting feed back. This process will help you determine whether they might be a Connector, Maven, or Salesmen; what are the major concerns they think seniors have; why they chose you; and what they think you're doing right. This is an incredible time of encouragement for you, but even more, your clients will hear all the great things you've done for others. This will validate their own experience and open them up to a commitment of partnership with you.

The partnership appeal is very simple. You've partnered with them in their success, and are simply asking them to become partners in your success. It's a two-way street. Clients really want to see you succeed and will refer you in large numbers if they believe its part of their partnership agreement. It's a very powerful event to have a small number of your clients hear others tell their stories of how you have helped them, and how others are willing to partner with you. They leave not only committed to partnering with you, but with a practical next step assignment.

You need to discover the *key relationships* in your client base in order to start a rush of client leads coming your way. What is a k*ey relationship*? Simple, it is a person who has a supercharged, natural ability to spread your "virus" at an incredible rate. These are people who are a combination of connector, maven, and salesman; people who believe in you and appreciate what you've done and who you are; and finally, people who are willing to partner with you.

Once you find these *key relationships* you will begin to market to and through them much as you would plan a marketing campaign. First, you'll discover the Connectors, Mavens, and Salesmen who are in your client base. These are people you need to stay in constant contact with, making them a focal point of your marketing efforts. They will be a constant source of client leads and are a key element to your marketing efforts.

Second, you will learn how the partnership you formed when you helped them with their finances will develop into a mutually beneficial relationship. In other words, they are willing to help you as you have helped them? In so doing, you will help them identify the friends and family they will introduce to you. You will learn how to ***train*** your clients to be your partners. These are some of the most important meetings in your weekly schedule.

Client Events

One of the most powerful relational marketing tools you have at your disposal is a well-planned client appreciation event. These events can be themed or just social events, both big and small. Your Focus Group Relationships will be strategic in bringing their friends who need your services, so meeting with them 3-4 weeks in advance of a Client Event will help prepare them for the event.

Client Events can fit almost any budget and with themes like New Year's Eve Party (a week late), Birthday Parties, Patriotic Parties, Senior Grad Nights, Picnics and Summer Fun, your clients and their guests will look forward to being a part of your success.

Testimonial letters

Prospects ask you all the time for references and your focus group is a great resource to help you. We'll teach you how to train your client partners to refer you by having them write a letter of affirmation. Create a "wall of fame" with the letters and your client's pictures that will impress new prospects. As compliance allows, use them in your company's brochures and at seminars to establish your credibility. We'll teach you how to acquire these letters and even help your clients write them.

Weekly Client mailings

What are the odds of a client partner referring you if they haven't heard from you for weeks after you initiated the partnership? Obviously, the odds are very low. So, it's incredibly important to make contact in some simple manner on a weekly basis. Mailing clients a letter with a new recipe, travel tip, market highlight, small gift, etc. keeps you in the front of their minds. At a time when they are with their friends and the discussion of finances comes up, they will think of you because you have stayed in front of them on a regular basis, while not becoming a part of the financial noise in the community.

Conclusion

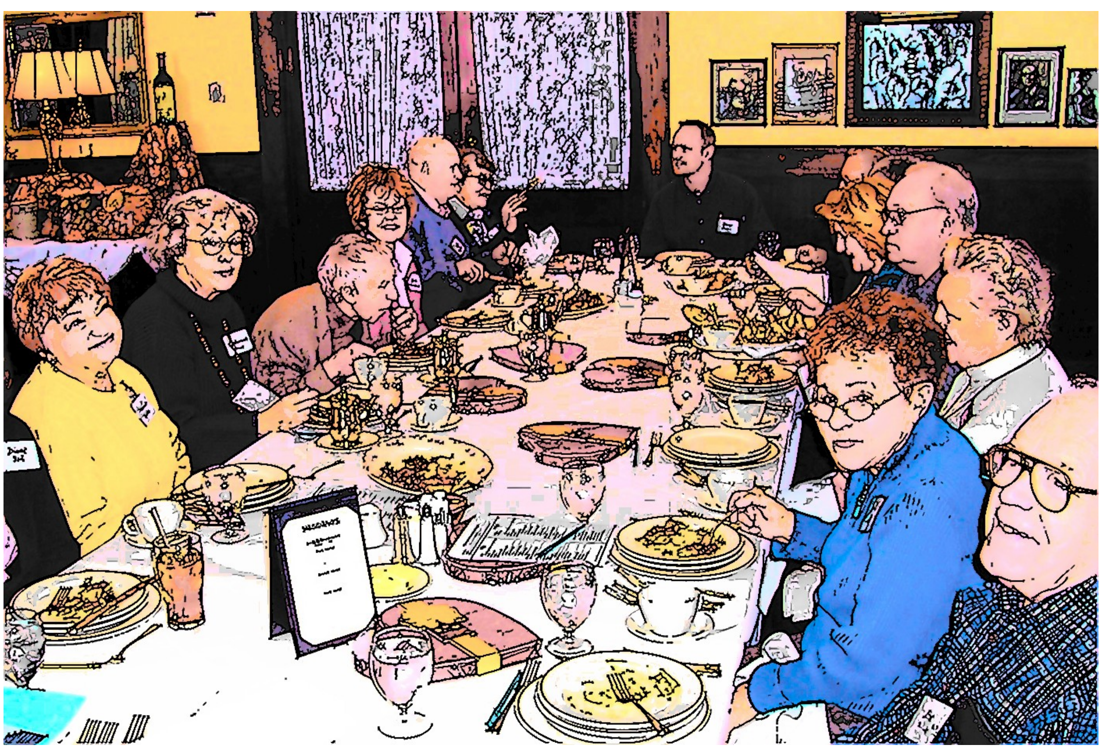
To be sure, all of these are powerful tools to make the most out of every marketing dollar you spend. They are meant to make the best use of the laws of influence and persuasion. Once you begin to use these cutting edge tools you will begin to see the three-quarters of the senior population that will never attend a seminar come through your office in large numbers.

Relational marketing will bring you more qualified prospects with larger cases, shorten your sales cycle, and cut your marketing budget. That's right. More money, less time, with less expense. Isn't that what you're looking for?

RELATIONSHIP

MARKETING

Focus Groups



Client Focus Groups Overview & Script

A client focus group is a unique opportunity to get valuable information from your clients: Information about them, their environment, and their openness to referring you.

Simply invite to a restaurant a group of 10-12 or your "A-B" type clients to a Focus Group lunch or dinner, telling them you value their input into your business. The time frame is about 2 ½ hours, with lunch or dinner provided. For the first hour you will be asking questions and getting feed back. This process will help you determine whether they might be a Connector, Maven, or Salesmen; what are the major concerns they think seniors have; what is wrong with other advisors; what is wrong with seminars; what topics would be good to cover at an event; why they chose you & if they were going to fire you what the reasons would be; and what if any interest they have in helping you build your practice. You will need to explain the "Vendor or Trusted Advisor" concept and train them in writing a "testimonial letter". Finally, you will set up follow-up luncheons with each household.

It's a very powerful event to have a small number of your clients hear others issues, how you have helped them, and how others are willing to support you. The lunch or dinner is a social time where you get to know your clients better in a more relaxed atmosphere and a simple thank you for their input. They leave knowing that you took the time to listen and are trained in how to partner with you.

You will want to create a group of this nature that meets twice a year for a good time together to discuss topics relevant to retirement, input into your business services, and to discuss the ongoing partnership with you. You can eventually mold groups together into larger groups for these semi-annual events.

Focus Group Goals

While this is a great opportunity to foster relationships with some of your best clients, it could all go for not if you don't have a clear vision of what you want to accomplish. Below is a list of objectives:

1. ***To get feed back from your clients on things that might improve your practice.***
2. ***To identify who among your client base is a connector, maven, or salesman.***
3. ***To have your clients buy into the concept of "partnership" with you on an ongoing basis.***
4. ***To have your clients commit to bringing their friends and family to an event to meet you, and train them how to do it.***

5. ***Set a lunch or dinner appointment with each couple/person there to collect their testimonial letter and answer any questions they might have.***

If you accomplish these, you will have succeeded tremendously. Remember, clients want to help you. They like you and believe in you already. They even validate their relationship with you by telling others about you. So, don't be shy. Be humble, and ask for their help. They are more than willing!!

Focus Group Agenda & Script

Note: Be sure and provide a gift for everyone who comes. It could be a coffee mug, calendar, candy, etc. Don't skimp on the gifts. Make them very nice. Also hand out the "Client Interests & Hobbies" and ask them to fill it out. Collect them before you begin the meeting.

1. **Introduction (5 min.):**
   "Thank you for coming today. I really appreciate you giving me your input into my practice. Today we'll be going over a number of items that will help me know your thoughts on our business, and we'll get to know each other a little better. Frankly, it's very uncomfortable to ask someone to give you a referral…and it's equally uncomfortable to be asked. True? So, let's not do that. I will not ask you for any names today. I want to share with you a way to partner with me that I believe you will be very comfortable with. At the end of our time you can tell me whether or not you are comfortable with it."

2. **Focus Group Questionnaire (25 min.):**
   Give your clients about 10 minutes to answer the first six questions on the questionnaire, asking them to be candid and honest. As you review the information, ask clarifying questions while you write them down on an easel pad. Be sure not to get defensive about a constructive criticism. Ask if there are any others with the same opinion, and tell them you will work hard to change. When they give you ideas for client parties or topics for seminars be sure and explore their ideas by saying things like "Tell me more about that" "Is there more?" "Sounds important, tell me why." Take your time in listening and write their ideas on an easel as they discuss them.

   When you get to the question of how you are doing they will be tempted to just give you simple answers like great, good, excellent, etc. Thank them for their kind words and write them on the easel. Dig further though, and ask them what you have been great, good, or excellent at.

   One of the points they will bring up is that they hired you because they trust you. They will also tell you that if you didn't keep the communication up they would be tempted to go elsewhere. Be sure and connect the dots with them and point out that communication equals trust and that is exactly why you are forming these Focus Groups.

3. <u>Client Tests (15 min.):</u>

These tests are to help you find out that the Connectors, Mavens, and Salesmen are in your group. Have some fun with these. Tell your clients you would like to get to know them a little better and that will help you understand how to work with them.

a. **Connector Test** (7 min.) Introduce this test by reviewing the concept of "6 degrees from Kevin Bacon." In other words we all know somebody who knows somebody who knows somebody…who knows Kevin Bacon. Tell them that this test will show how many "loose connections" we have. Go over the instructions and let them take their time going over the test. Most people will score between 20-40. The highest I've seen is over 400. Yet, that was really off the charts. Most high scorers are people who score over 50. If they are above 70 they are really a superb connector. Collect the sheets, with their names on them and put the tallies on the easel pad, giving the high score a nice prize.

b. **Who Am I?** (8 min.) This is a simple survey that will give you some insight into salesmen and mavens. All the odd numbered questions relate to being a salesman. All the even numbered are related to being a maven. Have them total the odd numbered questions and put it on the bottom left of the form, with the total of the even numbers on the bottom right. The higher the score, the more likely they are one or the other. Some people may rank high in both categories, but be prepared; because the "law of the few" means that you won't find a lot of pure salesmen or mavens. What you will find are people with more tendencies or leanings toward one or the other. These are people you will need to concentrate on. You need to take them out to lunch and dinner, making them the partners you are looking for. High scorers again are above 50 and real solid mavens and salesmen are above 70. Hand out a prize for the highest scores.

Note: If someone has already won a prize, let another high scorer win.

4. <u>Vendor vs. Partner (10 min.):</u> (use an easel)

"I would like to review with you the "advisor food chain." In order to choose a financial advisor you need to ask yourself some questions about the kind of person you'd like to work with. I think you here today will benefit by understanding the "food chain" of advisors and hopefully see our relationship in a new light.

First, do you want someone who's just a **vendor**? A vendor is someone who is just product oriented. It's someone with the next great product on the market. All they talk about is features and benefits, and don't ask a lot of questions about who you, the client, are, and what it is you really think you need. He's a vendor. You put a dollar in and out rolls a can. By the way, these are the people who most often scam their clients. Also, if you treat someone like a vendor, you will often times get them to respond as a vendor. So, be careful to treat people how you want them to act. If you just want a vendor, you probably wouldn't be here today.

Second, do you want just a **problem solver**? This is someone who looks at you and your situation as needing to be fixed. All they're good for is a solution and a commission. I had a plumber come and fix a toilet that was leaking. He did a great job. So, I asked him if he could fix my kitchen sink. He said sure he could. I asked him if he could remodel my basement. He laughed and said he was just a plumber, but would love to do the plumbing in the remodel project. Do you want someone who is just fixing a problem, or has some vision to prevent a problem from happening, or someone who has a can handle a broader scope of situations?

Third, do you want someone who is just a **consultant**? Probably the best description of a consultant is someone who can tell you 1000 ways to kiss but never has a date on Saturday night. They have a lot of ideas, with no experience in implementing them.

Fourth, do you want a **trusted advisor**? A person who is with you in thick and thin; knows you and your unique situation; is able to correct a problem and has the appropriate solutions in his tool kit. Most of all, he's able to determine with you, what's in your best interest. He listens. Not just to sell you something, but he really listens. Trust is earned over time and one of the sure signs that you have a trusted advisor is that you call him for advice on areas outside of his professional boundaries. You simply trust his judgment. Also, you find yourself in his office talking about a lot more than just finances.

Lastly, do you want a **partner**? This is a relationship that evolves. There is an emotional dynamic to this relationship. It begins to matter whether a client's accounts lose money, or the client has medical problems, or loses a loved one. This is someone who thinks with you about the broad ranging issues that affect a decision. It is someone willing to be with you in the good times and bad.

The other thing that is true is this, partnership as I know it is never a one-way street. Hopefully, you have felt that I have partnered with you in your retirement. If so, I would like you to consider partnering with me in my practice. Quite frankly, I need your expertise as much as you need mine. Let me ask you, are you willing to partner with me?

Now again, I understand that you probably have been asked to give someone a "referral" before and felt pressured. I don't want you to feel pressured. In fact, what I would like is for you not to give me any names today. What I would like you to do is over the next 30-60 days, as you go about your daily routine, and the topic of finances comes up with people you normally would run into, simply say, "You might like to talk with my advisor Dave." I know that the subject of finances comes up and it's at that time when talking about your advisor is the most appropriate. Now frankly, I have been remiss in letting you know that I would like to build my business with people just like you. So, you have probably been in the car after a good time with your friends after the conversation came up and said, "Shoot, I should have told them about Dave." Sound comfortable?

It's at this time that you can ask them if they would like to be your guest at our next event, and simply invite them to one of our workshops, seminars, snackshops or client events. This will give them the opportunity to meet me in a non-threatening, social setting to see if I'm "the type of person" they might want to do business with. I think people find it easier to get to know someone in a social setting. They have an opportunity to know if they "click" with them before they even talk business. We'll give them an opportunity to have a one-hour strategy session with me and if they are comfortable and have a need they'll respond. So, I'm simply asking you to partner with me and we'll have fun together doing it. Low key and simple. Fair enough?"

5. **<u>Testimonial Letters (5 min.):</u>**

Testimonial Letter

Here's the opportunity to ask them to write a referral letter. Ask them to use some of the things they talked about during the questionnaire discussion and write a short letter. These letters you can pick up at individual follow-up luncheons.

Hand out the Sample Testimonial Letter and the Sample Testimonial Letter Outline and tell them that you know its hard to think of what to write so these are for them to take home and use. Tell them, "When I'm writing a letter I often stare at a blank sheet of paper and my mind goes blank. So, hopefully these will help you when you're at home writing. What I will do is call each of you tomorrow and set up a luncheon with you over the next couple of weeks and you can give me the letter at that time. Sound comfortable?"

Also, tell them that you will be scheduling regular, quarterly focus group meetings with this group and will be creative in what you do. Things like Bar-b-q's, ball games, potlucks or other outings.

6. **<u>Thank You and Meal (60 min.):</u>**

Be sure and thank them for their input as you collect their surveys and tests. Enjoy the meal and tell them of the date for the next Focus group. Make this a nice meal by giving them some options from the menu. As the meal progresses, be sure and make a connection with each person there. Take your time and have fun with them.

7. **<u>Follow-up luncheons:</u>**

After the Focus Group luncheon call each client and set up a follow-up luncheon. Tell them you'll go over some of the things you discussed at the first luncheon and ask them to bring their testimonial letter. Send them a thank you letter reminding them of the date and time of your luncheon and ask them to bring their testimonial letter.

At this luncheon you will want to cover five topics:

1. Thank them for "partnering" with you, and review the concept.
2. Pick up their testimonial letter.
3. Review with them any friends they might have already spoken with and remind them of the next event.

Note: Be sure and collect their "tests" and surveys at the end of the program and before the meal.

Focus Group Check-list:

Restaurant for Lunch or Dinner
Easel & Markers
Client Packet:
- Focus Group Questionnaire
- Connector Test
- Who Am I?
- Gifts for everyone and 3 prizes.

Pencils

Focus Group Telephone Invitation Script

"Hello Mr. or Mrs. Client, I am getting together a focus group of our favorite clients, for a luncheon this week at (restaurant name) for two reasons; to get your thoughts on how I can better serve you and ideas on how I can grow my business with people just like you.

Can I include you and your wife (and or husband, whatever the case may be) as guest?

I will send you a letter with all the information of where and when and a map on how to get there. Thanks so much. See you then."

[Date]

Mr. & Mrs. [Client/Prospect]
[Address]
[City, State Zip]

Dear Mr. & Mrs. [Client/Prospect]

This is to confirm your invitation to our Client Focus Group luncheon at [Restaurant Name, Address, Phone] on [Date] at [Start & End Time].

It's an opportunity for me to show my appreciation for your business and an opportunity for you to meet a smaller group of our clients. We'll have a lot of fun and some great food. I'm looking forward to your input how to grow my business with people just like you. Thank you in advance for partnering with me in this way.

Sincerely,

[Advisor]

Your Company Name

Focus Group Questionnaire

Name: ____ Date: _____________

We have put together this short survey in an effort to continue to serve you in the best way we can. Please, take a moment to respond. Thank you for your participation.

1. What problems or issues first brought us together?

2. Why did you select us?

3. How are we doing?

4. Why would you fire us?

5. Do you enjoy the client events and what would you suggest for a theme or idea for our next event?

6. What topic would you like to cover at the next Client event?

7. Are there people you know who you think might need our services?

8. If yes, would you be willing to partner with us?

"Loose Connections"

This is a fun test to see how "connected" you are. People generally have deep friendships, yet this test shows the number of people you have ties to. Connected simply means that you have a lot of "loose" connections to people and groups. While it is not a test that determines how many good friends you have, it is an informal look at how many people you come in contact with at least at an introductory level. These are, on a minimal basis, a "soft" relationship.

On the bottom of the page is a list of around 250 surnames, which were taken at random from a phone book. Look through the list and score a point every time you see a name of somebody you know. (Use "know" loosely… As an example, if you met someone at an outing while standing in the food line and exchanged names, for this exercise you would "know" them.) Multiple names count. If the name is Henderson, and you know three Henderson's, you score three points. You might want to circle the names as you go and put the number of people you know with that name, right next to the name.

Score:______________

Algazi, Alvarez, Alpern, Ametrano, Andrews, Aran, Arnstein, Ashford, Bailey Ballout, Bamberger, Baptista, Barr, Barrows, Baskerville, Bassiri, Bell, Bokgese, Brandao, Bravo, Brooke, Brightman, Billy, Blau, Bohen, Bohn, Borsuk, Brendle, Butler, Calle, Cantwell, Carrell, Chinlund, Cirder, Cohen, Collas, Couch, Callegher, Calcaterra, Cook, Carey, Cassell, Chen, Chung, Clarke, Cohn, Carton, Crowley, Curbelo, Dellamanna, Diaz, Dirar, Duncan, Dagostino, Delakas, Dillon, Donaghey, Daly, Dawson, Edery, Ellis, Elliott, Eastman, Easton, Famous, Fermin, Fialco, Finklestein, Farber, Falkin, Feinman, Friedman, Gardner, Gelpi, Glascock, Grandfield, Greenbaum, Greenwood, Gruber, Garil, Goff, Gladwell, Greenup, Gannon, Ganshaw, Garcia, Gennis, Gerard, Gericke, Gilbert, Glassman, Glazer, Gomendio, Gonzalez, Greenstein, Guglielmo, Gurman, Haberkorn, Hoskins, Hussein, Hamm, Hardwick, Harrell, Hauptman , Hawkins, Henderson, Hayman Hibara, Hehmann, Herbst, Hedges, Hogan, Hoffman, Horowitz, Hsu, Huber, Ikiz Jaroschy, Johann Jacobs, Jara, Johnson, Kassel, Keegan, Kuroda, Kavanau, Keller, Keveill, Kiew, Kimbrough, Kline, Kossoff, Kotzitzky, Kahn, Kiesler, Kosser, Korte, Leibwitz, Lin, Liu, Lowrance, Lundh, Laux, Leifer, Leung, Levine, Leiw, Lockwood, Logrono, Lohnes, Lowet, Laber, Leonardi, Marten, McLean, Michaels, Miranda, Moy, Marin, Muir, Murphy, Marodon, Matos, Mendoza, Muraki, Neck, Needham, Noboa, Null, O'Flynn, O'Neill, Orlowski, Perkins, Pieper, Pierre, Pons, Pruska, Paulino, Popper, Potter, Purpura, Palma, Perez, Portocarrero, Punwasi, Rader, Rankin, Ray, Reyes, Richardson, Ritter, Roos, Rose, Rosenfeld, Roth Rutherford, Rustin, Ramos, Regan, Reisman, Renkert, Roberts, Rowan, Rene, Rosario, rothbart, Saperstein, Schoenbrod, Schwed, Sears, Statosky, Sutphen, Sheehy, Silverton, Silverman, Silverstein, Sklar, Slotkin, Speros, Stollman, Sadowski, Schles, Shapiro, Sigdel, Snow, Spencer, Steinkol, Stewart, Stires, Stopnik, Stonehill, Tayss, Tilney, Temple, Torfield, Townsend, Trimpin, Turchin, Villa, Vasillov, Voda, Waring, Weber, Weinstein, Wang, Wegimont, Weed, Weishaus.

Who Am I?

Name: ______________________________

Answer the following questions as you feel best represent you on a regular basis. Place a number between 1 and 10 with 10 being a very positive response and saying that it is most like you. 1 is a very negative response and is most likely not like you.

	Score
1. I have a great time telling others about my experiences.	_____
2. I love gathering information.	_____
3. People say I can sell a refrigerator to an Eskimo.	_____
4. I enjoy finding the best price when I buy something.	_____
5. I really enjoy playing games especially if I win.	_____
6. People tend to ask me regularly about where to make purchases.	_____
7. I enjoy watching sports.	_____
8. I will research several sources before making a major purchase.	_____
9. I enjoy participating in sports.	_____
10. I love telling people where to find the best prices.	_____
11. I am a very expressive person.	_____
12. The quality of an item I purchase is very important to me.	_____
13. I have very little problem in getting people to see my point of view.	_____
14. I enjoy reading Consumer Reports magazine.	_____
15. I enjoy telling stories of events I've participated in.	_____
16. I usually plan out a trip thoroughly by investigating all the options available in the destination I'm heading.	_____
17. People often tend to agree with my point of view.	_____
18. I enjoy technology like computers, cell phones, DVD players, etc.	_____
19. I am an optimistic person.	_____
20. I even enjoy researching out a good buy for someone else.	_____

RELATIONSHIP
MARKETING

DATE

CLIENT NAME
ADDRESS
CITY, STATE ZIP

Dear Mr.& Mrs. CLIENT,

I wanted to thank you for attending our luncheon at [RESTAURANT NAME] this past month.

We had a great time seeing and visiting with our favorite clients, and of course, the food was great!

I look forward to seeing you again on [DAY, DATE, TIME] at [RESTAURANT NAME] (address below).

Please remember to bring your "testimonial letter". If you have any questions call [ADMIN FIRST NAME] at our office, she will be glad to help you, [ADMIN PHONE NUMBER].

Looking forward to seeing you,

[ADVISOR]

[RESTAURANT NAME]
[ADDRESS]
[CITY, STATE]
[PHONE]

Interests, Passions, & Hobbies

Name: ___________________________ Spouse: ________________________

Phone: ___________________________ Email: ________________________

Please, check the items that are of interest to you and then label your top 2.

HIS

- ☐ **Golf**
  __9 hole __18 hole __Cart __Walking
- ☐ **Horses**
- ☐ **Motorcycles**
- ☐ **Camping**
- ☐ **Sporting Events**
  - **Football/Favorite Team:_______________________**
  - **Baseball/Favorite Team:_______________________**
  - **Basketball/Favorite Team:_______________________**
  - **Other/Favorite Team:_______________________**
- ☐ **Festivals**
- ☐ **Fairs, Circus & Exhibits**
  - **Type:_______________________**
- ☐ **Music Events**
- ☐ **Theatre**
- ☐ **Cards/Type:_______________________**
- ☐ **Travel**
- ☐ **Timeshares**
  - **Location:_____________________**
- ☐ **Fishing/Type:______________________**
  - **Location:_____________________**
- ☐ **Charitable Events**
- ☐ **Stock Watcher**
- ☐ **Other:__________________________**
- ☐ **Leadership roles in organizations:______________________**
- ☐ **# of Children: _________**
- ☐ **# of Grandchildren:_________**

Place #1 and #2 by your top choices, please.

HERS

- ☐ **Quilting**
- ☐ **Shopping**
- ☐ **Golf**
  __9 hole __18 hole __Cart __Walking
- ☐ **Horses**
- ☐ **Motorcycles**
- ☐ **Camping**
- ☐ **Sporting Events**
  - **Football/Favorite Team:_______________________**
  - **Baseball/Favorite Team:_______________________**
  - **Basketball/Favorite Team:_______________________**
  - **Other/Favorite Team:_______________________**
- ☐ **Festivals**
- ☐ **Fairs, Circus & Exhibits**
  - **Type:_______________________**
- ☐ **Music Events**
- ☐ **Theatre**
- ☐ **Cards/Type:_______________________**
- ☐ **Travel**
- ☐ **Timeshares**
  - **Location:_____________________**
- ☐ **Fishing/ Type:_____________________**
  - **Location:_____________________**
- ☐ **Charitable Events**
- ☐ **Stock Watcher**
- ☐ **Other:__________________________**
- ☐ **Leadership roles in organizations:______________________**
- ☐ **# of Children: _________**
- ☐ **# of Grandchildren:_________**

Place #1 and #2 by your top choices, please.

FOCUS GROUPS
Simple Outline

First luncheon:

1. Choose date and list of "A-B" clients to invite.
2. Set-up luncheon with an upscale restaurant.
3. Call clients and invite to luncheon.
    a. Send out confirmation letter with map and directions.
4. Checklist for preparation of group luncheon
    a. Easel & Markers
    b. Client handouts:
        i. Focus Group Questionnaire
        ii. Connector Test
        iii. Who Am I?
        iv. Testimonial Letter Sample
        v. Testimonial Letter Outline
    c. Gifts for each couple/person
    d. Three prizes (for high scorers of each test)
    e. Pencils
5. Print off handouts, script, and get supplies together.

Morning of luncheon at restaurant

1. Review Focus Group Overview
2. Focus Group Meeting (90 minutes):
    a. Greet Clients (Hand out materials one at a time as you go through program.)
    b. Serve appetizers and take lunch orders
    c. Focus Group Questionnaire
    d. Loose Connections
    e. Who Am I?
    f. Vendor to Partner/Trusted Advisor
        i. Ask them to partner with you.
    g. Testimonial Letter
    h. Testimonial Letter Outline
    i. Close with a reminder that you will be setting up follow-up lunches at which you'll collect their Testimonial Letters.
    j. Serve lunch (about 60 minutes)
    k. Remember to collect "Hobbies, Passions & Interests; Focus Group Questionnaire; Loose Connections; and Who Am I?"

After luncheon, in office follow up:

1. Read over questionnaire to get feed back from clients.
2. Record in database:
    a. "Who Am I"
    b. "Loose Connection"
3. Use this information to decide which clients are Connectors, Salesmen, and Mavens.
    a. If they score over 50 in two out of the three tests, they are considered high scorers.
    b. Meet for lunch with high scorers monthly.

Follow-up luncheons with individual Focus Group clients:

1. The day after the FG luncheon, call clients for follow up luncheon.
    a. This appointment is to get testimonial letters.
    b. Send out thank you and confirmation letter to remind clients of appointment and to bring their Testimonial Letter.

Follow-up Luncheon:

1. Bring Sample "Neighborhood Announcement"
2. Have a casual lunch
3. Receive their Testimonial Letter
4. Remind them to partner with you when they have a conversation about finances with friends and family
5. Receive and go over any referrals they may suggest
6. Remind them of upcoming events (i.e. future Focus Groups, or seminars)

Weekly Client Mailing: Mail tidbits every week to Focus Group clients with handwritten note. Sign something like… "Thanks for partnering with us."

Quarterly: Newsletter, Gifts, and Birthday Chocolates

RELATIONSHIP

MARKETING

Testimonial Letters

Client Testimonial Letter

While many of your clients would feel good about referring you they don't often know how. A testimonial letter is a great way to communicate to the trust they have in you as an advisor. Tell your client that people often ask for references and it would be great to have a binder of testimonial letters on your desk so new clients can read them. You'll be asking your clients to use these in a Neighborhood Announcement, and a brochure. You will need to check with your Broker/Dealer for approval on how you use these letters.

One of the great strategies of having your clients write testimonial letters is that it operates as a training tool to help them know what to say when referring you. Once they've completed the letter, and they are in a conversation about financial advisors, they will know just what to say.

Since people don't write these types of letters often they just need a little help in order to think it through. Here's a simple outline:

Dear (advisor's name),

(Body)
1. *How you came to work with us.*
2. *Areas of concern that we helped with.*
3. *A referral statement like, "I believe I can refer you to anyone because…"*

"Please, use this letter as a testimony for others seeking the kind of help you gave me/us."

Sincerely,
Client Signature

Once the client has agreed to writing the letter have this outline handy for them to look at. Tell them you'll be asking them to lunch in a week or so, and they can go over their letter with you at that time. Be sure and follow up.

One of the usages for this type of letter is to put together a "testimonial book" filled with letters from your clients. Once you get a few, show the ones you have to those you are asking to write a letter. They will be very encouraged to write one for you by seeing others that have. As mentioned above, a brochure is a great way to use testimonials.

Sample Testimonial Letter

November 15, 2005

Dear Dave Vick,

Doris & I just wanted to write you a quick letter of thanks. We met you a month ago at your seminar in Crystal Lake and have greatly benefited from your expertise. We needed someone who could help us with our estate and financial planning needs, and you have been a tremendous help to us.

We had been to other seminars, but when we came to yours we both felt like you could help. You explain things in a very easy to understand manner and we felt right then we could trust you. That feeling of trust has been rewarded with your professionalism.

We really appreciate the way you and your attorney work together and made the process both simple and complete. Your help with our finances has been a big relief, too. We were struggling with what to do with our IRA's because we had lost money before and didn't know what to do. Investing with you in a guaranteed asset that's linked to the S&P 500 has given us a very real peace of mind.

So, thank you so much for your expertise and professionalism. We can highly recommend you to anyone!

Thanks again,

John & Judy Smith

RELATIONSHIP

MARKETING

Key Relationships

Key Relationships

One of the most important aspects of Relational Marketing is the development of Key Relationships (KR) with clients. It's through these very important clients that you will see the most success. So, who are these Key Relationships and how do you build your practice with them?

Key Relationships are those clients of yours that have three qualities:

1. *First, they are big believers in you and what you do.*
2. *Second, they are an exceptional cross between connector, maven, or salesman, which means they will have scored high on at least two of the three tests relating to the Law of the Few.*
3. *Third, they must be unreservedly willing to partner with you in building your practice.*

These folks are few and far between, but you have them in your client base and they will do wonders for your business. You only need six to seven of these highly effective allies and you will see a flood of client leads come your way.

You will need to identify 10 to 15 KR's and begin a strategy of marketing to and through them. They will support you and deliver the goods if you work on developing the relationship. Each month you need to build the relationship by calling, emailing, mailing, and going to lunch or dinner. You will want to spend time and money on these great folks. Don't be cheap! If you honor them with your best, they will return in kind.

Social events are a great way to build your relationship with these key individuals. Here's a list of ideas to try:

1. ***Take them to a baseball, football, basketball, hockey, golf, tennis, or any other athletic event.***
2. ***Take them golfing.***
3. ***Rent a golf pro for a lesson with them.***
4. ***Take them out to a top notch restaurant for dinner or lunch.***
5. ***Take them out to dinner and a movie.***
6. ***Call them once a month.***
7. ***Go to a play or musical.***
8. ***Go to a county or state fair.***
9. ***Go to a concert.***
10. ***Take them to a special conference on an area they are fond of like horticulture, golf, RV's, fishing, finances, etc.***
11. ***Take them fishing.***
12. ***Host a wine and cheese tasting party.***
13. ***Tour a winery or brewery.***
14. ***Contact a travel agency about special one day tours in your area.***
15. ***Go to a college dramatic, musical or athletic event.***
16. ***Christmas lights tour.***

17. ***Church event.***
18. ***Visit a Nursing Home with them while they are seeing one of their family or friends.***
19. ***Give them a CD or DVD.***
20. ***Give them flowers.***
21. ***Give them Birthday, anniversary, or holiday greeting cards.***
22. ***Give them chocolate.***
23. ***Give them a box of steaks.***
24. ***Give them an instructional video on gardening, golfing, fishing, etc.***
25. ***Give them a book.***

All of these are just a few of the ideas you can use in developing the relationship with them. One of the key phrases you will want to say each time you are with them is "thank you for partnering with me." These events and the relationship you develop with them are the "pay-off" they receive for sending you the volumes of people they will inevitably drive your way. They will enjoy being an "insider" in your practice and will want to help you grow.

One of the obvious by-products of this type of marketing is that you really begin to understand what your key clients are all about. You will develop such a strong relationship that it be a true life-long client friendship. Is there any other way to do it?

RELATIONSHIP

MARKETING

Second Focus Group Meeting

RELATIONSHIP
MARKETING

Second Focus Group Meeting

The second Focus Group meeting is done approximately 4-6 months after the first. The purpose is to bring the group back together for group building, training, praise for their effort, and planning out future events. The end result should be a renewed commitment to the partnership and a more effective sales team.

The outline for the meeting is simple:

Note: As in the first meeting be sure and bring gifts for everyone. Also, bring prizes for the ones who referred you.

Welcome and appetizers
Welcome them to the second quarter meeting and give them a brief agenda for the time. Have appetizers served.

Review of Group's Partnership agreement
Review the group's purpose: partnering together. Say something like, "Last time we got together I went over the advisor's food chain from Vendor to Partner. I outlined a simple way of partnering with me that, I'm excited to say, has worked very well. If you remember, I told you that I was very uncomfortable asking for referrals and that I understand that you are uncomfortable as well. Yet, if as you have conversations with your friends about finances, simply say, "you might want to talk with my advisor Dave," and then tell them about your experience with me, then giving their name and phone number to me, it would be an easy way to partner with me. Also, as I told you, seminars are very expensive and I really would love to take you and your friends out to lunch to meet them and for them to see if I'm the "kind" of person they would want to do business with. It's that simple. Are we still in agreement? Great." Take about 5 minutes.

Review of referral progress
At this point tell them about the new clients you have as a result of their efforts. Make sure and make a big deal out of each one, noting the relationship between the old and new client. Thank them for PARTNERING with you and give them a prize. This should take about 10-20 minutes.

Go over the "Sharpening the Focus of Your Company" sheet
Hand out the sheet and give them a few minutes to write some thoughts down. Go over each question, writing some of their thoughts down on an easel. This is a great time of training them, so give them time to express their ideas.

Be sure and tell them about your marketing events and invite them to bring guests. This is also the time to recruit those who want to speak at your event, telling the audience about their experience with you. This should take about 30 minutes.

Next event planning

Discuss a couple ideas with them about the next get together and decide on the event. The next event might be a "pot-luck" dinner at some one's home, a bowling night, a movie night, etc. It should be an event that they can invite a friend to. Discuss some dates and times and then tell them you'll send them a letter that has all the specifics. Take about 20 minutes.

Lunch

Take about an hour and have a great time with them. Entire meeting should last about 2 hours.

Remember, you don't need to schedule appointments with each one this time, but be sure and give them the opportunity to go to lunch with you and one of their friends. Also, if you haven't already done so, give them the list of your up and coming seminars so they can bring people.

Sharpening the Message of [AGENCY NAME]

1. What are the key issues that need to be discussed in today's senior market?

2. What are three areas that seniors struggle with in their finances?

3. What is one way you would respond to a person who asked you about [ADVISOR FIRST NAME] and [AGENCY NAME]?

4. How would you convey, in one sentence, what you feel your experience has been like with [ADVISOR FIRST NAME] and [AGENCY NAME]?

5. What are the ways you would use to get the message out if you were [ADVISOR FIRST NAME]?

6. Would you be willing to attend one of [ADVISOR FIRST NAME] seminars and give a short testimonial about your experience with [AGENCY NAME]?

Client Parties,
& Weekly Focus Group Mailings

Client Parties

Client Parties or Client Appreciation events are great for two reasons: first, getting in front of your clients at a social type of gathering just helps build the relationships you need for them to do more business; second, you end up doing more business.

Use your focus groups to help you plan and put on the client party. Their input will make sure that it's a quality event that seniors will enjoy and create a stronger partnering relationship with your focus group members.

Steps to produce a great Client Party:

1. Choose a date that is around a holiday so you can use it to spin off a theme. Christmas, Thanksgiving, New Year's Eve, Valentine's Day, Ground Hog Day, Mother's or Father's Day, and Fourth of July are all great times to celebrate with your clients.
2. Choose a restaurant that will be centrally located for most of your clients. If you market in different areas miles apart, just have two or three events.
3. Mail an invitation that thanks your clients for the business they've done with you and invites them to the party. Make sure and tell them what you will be covering in terms of an agenda or special speaker. Also, be sure to tell them to invite some friends.
4. Be sure and order some inexpensive gifts for your clients. If you want some great ideas, check out Great Impact. Their website is www.greatimpact.com. Buy everyone a gift like a mug, calendar, tote bag, or pen set with your company's name and phone number on it. The cost is generally between $5-$10 each, and clients love this stuff.
5. Get your hula skirt and dancing shoes on and party, party, party. Remember, when you are there at the party to make it a celebration. Spend time in the content portion to thank your clients for their business and their trust.
6. Have a couple of focus group clients take 5-6 minutes each tell their story of working with you.
7. Be sure to go around to each table and ask for a review for old clients and a first time financial review with the new folks. The appointment rate will be high, and the business will be great.

Lastly, it's a good idea to do at least a couple of these a year if not more. They are less expensive than a regular seminar because the mailing costs are less and your clients bring their friends. Clients really look forward to these events and with the Focus Groups' participation it will be a bigger success than ever!!

RELATIONSHIP
MARKETING

Weekly Focus Group Mailings

A key step in creating a word of mouth epidemic is to keep your message in front of your Focus Group clients on a regular basis in such a way that you are not just adding to the "financial noise" of their daily existence. Your communication must be regular and different than the usual financial mailers they receive. They must be varied and personal.

To that end, you will be mailing a quarterly newsletter, a Birthday gift, and a short "thought you'd like this" mailer weekly. What we want to accomplish is a gentle reminder of your message and a sense of reciprocity on their part. If you give someone a gift, they tend to want to give back something of equal or greater value. You have honored them with seeking their advice and partnership, taken them out to a nice meal, and now you simply communicate on a more personal level. This communication should take no more than an 30 minutes a week and cost no more than .50 cents a focus group client.

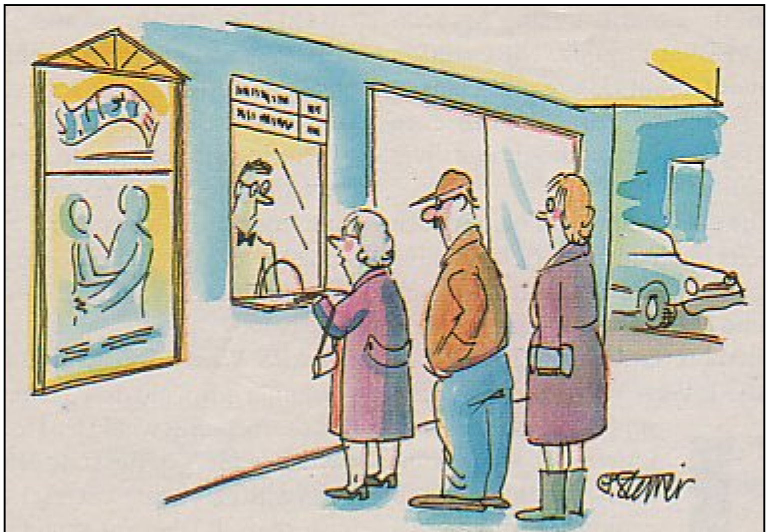
We will be e-mailing you articles, cartoons and humor, recipe's of the season, travel tips for seniors, etc. Your job is simply to put a little note on them and mail them out. Your hand written expression is important. Remember, you will only be mailing out to 20-40 Focus Group homes, so it shouldn't take more than 30 minutes a week. Simply choose from the material we send you, print it out on your stationary, write a quick note (i.e. "thought you'd like this" "makes you think"), and mail. It's as easy as that. Again, always end with the salutation, "thanks for partnering with me, …"

You need also, to choose a quarterly newsletter if you haven't already done so. If you are securities licensed check with your broker dealer for their recommendations.

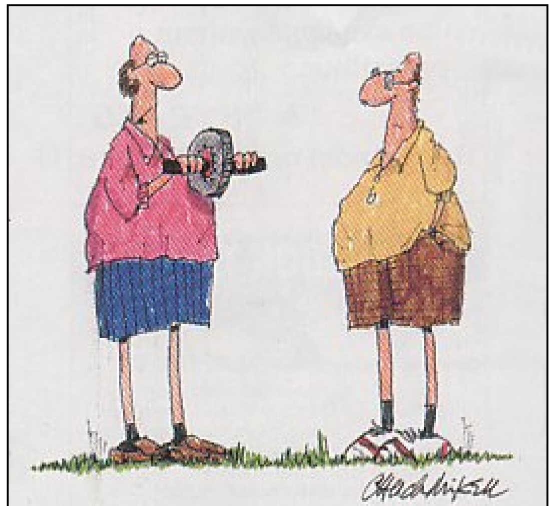
Last of all remember, these mailings will reach them each week at a time they may be talking with a friend who needs your service. Your consistent, gentle reminder of their partnership with you will mean the difference between them remembering to refer you or staying silent.

SAMPLE: From the Desk of...
[ADVISOR NAME]

Quotes from Actual Insurance Claims
- Coming home, I drove into the wrong house and collided with a tree I didn't have.
- In an attempt to kill a fly, I drove into a telephone pole.
- I had been driving for 40 years when I fell asleep at the wheel and had an accident.
- I collided with a stationary truck coming the other way.
- I told the police I was not injured, but on removing my hat I found that I had a fractured skull.
- The pedestrian had no idea which direction to run. So I ran over him.
- I pulled away from the side of the road, glanced at my mother-in-law, and headed over the embankment.



"One senior discount for the six o'clock show, and could you fill this prescription, please?"



"I've been rolling this thing on my abs for a month, and I don't see one bit of difference."

[CLIENT FIRST NAME],
Thought you might need a good laugh.
Thanks for partnering with me,
[ADVISOR NAME]

People First – Money Second
[AGENCY NAME]
[PHONE]

RELATIONSHIP

MARKETING

APPENDIX

Establishing Your Focus Groups

Client breakdown:

"A"	**High Relationship/High Profit**	**"C"**	**Low Relationship/High Profit**
"B"	**High Relationship/Low Profit**	**"D"**	**Low Relationship/Low Profit**

Focus Group #1:

"A-B" Clients:

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________
5) ______________________________
6) ______________________________
7) ______________________________

Potential Locations:

Focus Group #2:

"A-B" Clients:

1) ______________________________
2) ______________________________
3) ______________________________
4) ______________________________
5) ______________________________
6) ______________________________
7) ______________________________

Potential Locations:

RELATIONSHIP
MARKETING

Establishing Your Focus Groups- cont'd

Client breakdown:

"A"	**High Relationship/High Profit**	**"C"**	**Low Relationship/High Profit**
"B"	**High Relationship/Low Profit**	**"D"**	**Low Relationship/Low Profit**

Focus Group #3:
"A-B" Clients:
1) ______________________________________
2) ______________________________________
3) ______________________________________
4) ______________________________________
5) ______________________________________
6) ______________________________________
7) ______________________________________

Potential Locations:

Focus Group #4:
"A-B" Clients:
1) ______________________________________
2) ______________________________________
3) ______________________________________
4) ______________________________________
5) ______________________________________
6) ______________________________________
7) ______________________________________

Potential Locations:

Sample Calendar of Coming Events
[PLACE YOUR LOGO HERE]
Coming Events for Fall of [DATE]

SAMPLE:

Thursday, Sept. 10th - 9:30am
"**A Morning at the Movies**" at Marcus Theatres in Addison on Lake Street.
We'll have popcorn and pop while we watch ***"The Bourne Ultimatum".*** Afterwards we'll have pizza, so get your friends lined up soon and reserve your seat.

Tuesday, Sept. 24th - 11:30am
"**Bring A Friend for Lunch**" at Villaggio Ristorante, 1242 West Lake Street, Roselle
Grab a friend and join us for good food and some interesting information. I only speak for 15 minutes on a current hot topic and then we enjoy lunch together.
This month's topic: ***"The Mortgage Disaster & How it Affects You"***

Tuesday, Oct. 1st & Thursday, Oct. 3rd – 5:00pm
"Maximizing Social Security" – at College of Dupage Extension Campus, 1122 Lake St., Bloomingdale
Are your friends looking for some trusted advice from a holistic approach to financial planning? Are they tired of the typical dinner seminar? ***THEY WON'T WANT TO MISS THIS IMPORTANT WORKSHOP:***

MAXIMIZING SOCIAL SECURITY

> ***Social Security*** *is one of the most valuable and least understood benefits available to retirees today.* ***Advance planning is essential****, and the decisions you make now can have a tremendous impact on the total amount of benefits you stand to receive over your lifetime. This* ***educational workshop*** *will provide you with much needed information to help you understand the system, coordinate spousal and survivor benefits, minimize taxes, and* ***maximize your personal benefits.***

There may be ways to maximize the lifetime Social Security benefits you receive. It's important to have a good understanding of these issues:

- *How married couples can* ***coordinate benefits to help enhance spousal and survivor benefits***
- *How* ***to earn 8%*** *on delayed retirement credits*
- *How the* ***"do over,"*** *and* ***"start, stop, restart"*** *strategies work*
- *How working could affect your benefits, and* ***the taxability of Social Security benefits***
- *How claiming early worker benefits could lower your spousal benefit at full retirement age*
- *The* ***effect of remarriage on survivor benefits*** *for widowed and divorced spouses*
- *How to* ***integrate assets with Social Security Benefits*** *to maximize retirement income*

Tuesday, Oct. 27th – 11:30am
"**Bring A Friend for Lunch**" at Greek Islands, Lombard
Grab a friend and join us for good food and some interesting information. I only speak for 15 minutes on a current hot topic and then we enjoy lunch together.
This month's topic: ***"Watching Out for Phone Scams".***

Wednesday, Nov. 11h – 10:30am
"Bring A Friend for Lunch" at Brian's Charhouse, Carol Stream
Grab a friend and join us for good food and some interesting information. I only speak for 15 minutes on a current hot topic and then we enjoy lunch together.
This month's topic: ***"Mutual Fund Madness!"***

Tuesday, Nov. 17th – 11:30am
"A Morning at the Movies" at Marcus Theatres in Addison on Lake Street.
We'll have popcorn and pop while we watch ***a current run hit movie.*** Afterwards we'll have pizza, so get your friends lined up soon and reserve your seat.

Thursday, December 10th – 6:00pm
"Annual Christmas Lights Tour" at Empress Banquets in Addison
One of the year's best events!! We'll have some Christmas deserts and cheer at Chandler's while Santa Dave passes out gifts. We'll board a couple of Christmas Trollies with our hot chocolate and head out for a fantastic view of the season's best lights. This one is guaranteed to get you in the mood for the holidays!! *(Reserve your spot early – due to limited space)*

Remember, all our events are at no cost to you, and are opportunities to partner with us in meeting new people who might need our services. We greatly appreciate your partnership and truly love to party with you and your friends. Call to reserve your seats for each event.

Call today…

[AGENCY PHONE]

Focus Group Success in 5 Easy Steps

Step One: **CHOOSE**

Choosing involves three related events.

1. *Choose those "A" or "B" clients you want to invite.* "A" clients are HIGH-RELATIONSHIP/HIGH-PROFIT, and "B" clients are HIGH RELATIONSHIP/LOW-PROFIT. In other words, these are clients you have developed the best relationship with. You will need 10-12 people.
2. *Choose the location.* It should be a small banquet room in a high end restaurant. Make it special in terms of the facility. A "board room" type setting with everyone around one table is a must.
3. *Chose the date of your first group meeting*. Probably a Tuesday, Wednesday, or Thursday for lunch would be ideal in the senior market. If you have younger clients its fine to schedule a dinner. You can set it up in a week's time.

Now you have the clients, the location and the date. Call the clients you chose and follow up with a letter.

Step Two: **DO THE FIRST FOCUS GROUP MEETING**

This will be one of the easiest, most fun events you've put on. The meeting starts at about 11:30am and you eat lunch at 12:30pm. Serve appetizers and drinks. Bring gifts and prizes. The goal of the meeting is to create client partnerships. You will not be asking for referrals. You will be asking them to be your partners. By the way, your clients believe in you and want to be a part of this team. This meeting will be the launching pad for great things to come. We provide a script that has worked impressively all around the country, so use it! You will also leave the meeting with 10-12 client partners.

Step Three: **DO THE FOLLOW-UP**

At the end of your Focus Group meeting schedule a follow-up lunch with each household in attendance. Do it, if possible, the next week. Don't wait. The longer you wait the less your clients will sense the urgency to refer you. Though you haven't asked them for referrals yet, they will have assumed that's what you want. It will solidify their partnership and put you on a whole new relationship level with them.

Step Four: **DO THE SECOND FOCUS GROUP MEETING**

You can even go back to the same restaurant!! It's that easy. While you are in the process of follow-up meetings, schedule your next seminar. Leave time to meet with your Focus Group(s) for a second time. You will be using your new client partners to fill the room, sell attendees, bring referrals, and speak on your behalf that evening. Connecting these events will generate a significant amount of activity before, during, and afterward your seminar. Your partners will be your greatest sales force.

Step Five: **DO YOUR NEXT SEMINAR/WORKSHOP USING CLIENT PARTNERS**

The beauty of this strategy is that your partners will not only invite people to the seminar/workshop, but when some of their friends can't come, they will set up meetings with you in the weeks to follow. Business will be BOOMING!!

This five step strategy will kick off your Focus Groups and bring your business to a whole new level. Imagine:

- ✓ ***Higher closing rates***, with prospects who already trust you.
- ✓ ***Larger cases*** because their friends have proven your value.
- ✓ ***Lower expenses*** because of the need for fewer seminars.
- ✓ ***More free time*** with family (and golf clubs!)!