

2021 Webinar Cheat Sheet

Increasing Attendance Ratios:

- 1st confirmation call on the <u>day of RSVPing or the morning after</u> (ideally by the advisor, but staff can as well)
- 1st BombBomb Video RSVP confirmation via email, <u>after the 1st confirmation call</u> or leaving a voicemail
 - a. **Generic Intro**: "Good morning. My name is (Advisor), and I wanted to thank you for signing up for our live educational (Webinar Topic) webinar next (Day of Week). During this webinar, I will be discussing... If there is anything additional you would like me to cover, please give me or my team a call or reply to this email..."
- 3. 2nd Confirmation/Reminder Call the day before the webinar
- 4. **2nd BombBomb Video Confirmation/Reminder** the day before the webinar, <u>after making</u> <u>the 2nd confirmation/reminder call</u>
 - a. **Generic Intro**: "Good morning. My name is (Advisor), and I wanted to thank you for signing up for our live educational (Webinar Topic) webinar tomorrow at (Time). During this webinar, I will be discussing... If there is anything additional you would like me to cover, please give me or my team a call or reply to this email..."

Increasing Appointment Scheduling Ratios:

- 1. Record the Webinar/Workshop and send to Pat Peason/Holly for personal coaching
 - a. <a>patrick@peasongroup.com
 - b. <u>holly@peasongroup.com</u>

Increasing Appointment Kept Ratios:

- 1. 1st confirmation call the <u>day the appointment is scheduled or the morning after</u> (ideally by the advisor, but staff can do this as well)
- 1st BombBomb video confirmation via email, <u>after the 1st confirmation call</u> or after leaving a voicemail
 - a. **Personal Intro:** "Hello, Mr. and Mrs. (*Prospect*). My name is (*Advisor*), and I'm really looking forward to our scheduled call to deliver/discuss XYZ..."



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- b. **Generic Intro**: "Good morning! My name is (Advisor), and I'm really looking forward to our scheduled call to deliver/discuss XYZ..."
- 3. Send **physical package/folder** via snail mail <u>if the appointment is scheduled 5+ days out</u>
- a. You can send the package/folder after the 1st appointment if you want to qualify them first, but sending this information prior will increase the number of 1st appointments kept
- 4. 2nd confirmation call the <u>day before</u> the scheduled call
- 5. **2nd BombBomb video confirm** the day before the scheduled call, <u>after the 2nd confirmation</u> <u>call</u>
 - a. For best results, text and email it, since text videos get a higher open/watch ratio over the emails
 - b. **Personal Script**: "Hello Mr. and Mrs. (*Prospect*). My name is (*Advisor*), and I'm really looking forward to our scheduled call tomorrow..."
 - c. **Generic Intro**: "Good morning! My name is (Advisor), and I'm really looking forward to our scheduled call tomorrow..."

Increasing 2nd Appointments Scheduled:

- 1. Don't dive too deep into the sales process on the 1st appointment/call!
 - a. The main goal of the 1st appointment is to build rapport, gather info, begin to fill out the CFQ, qualify the prospect, etc.
- 2. Stress the importance of the 2nd appointment and the fulfillment/analysis (CTA)
 - a. The reason for asking them so many questions is to deliver the fulfillment/analysis on the 2nd appointment/call
- 3. Delicately disturb and create urgency for the 2nd appointment/call
 - a. 'Push Away' attitude: "Well, I may be able to find some time next week to squeeze you into my schedule..."

4. Don't give out too much homework!

- a. Only ask them to send their statements
- b. You should start by gathering some information to fill out the CFQ on the 1st appointment/call; you can continue to gather data on 2nd appointment/call

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Obtaining Statements for *2nd* **Appointment:**

- 1. Offer at least **2 different options** for the prospects to be able to provide you with their statements:
 - a. Log in to their retirement plan or brokerage account online and send the PDF by email or through the Secure Document Upload feature on your website
 - b. Scan the statements and either email or use the secure document upload feature on your website
 - c. **Take a cell phone picture** and either email or use the **secure document upload** feature on your website
 - d. Photocopy the statements and send by snail mail
 - e. Ask them to have the **statements on hand** for the 2nd appointment and hold these up to the webcam so that you can see them

Increasing Closing Ratios:

- Send the Audio Recording of the 1st, 2nd, and/or 3rd virtual appointments to Teresa so she can schedule a coaching call with Dave or Rick to review the appointments
 - a. tmariconda@advisorsacademy.com
 - b. Alternatively, you can have Dave/Rick **attend the virtual appointment** if you let Teresa know to schedule this on their calendars
- 2. Keep your sales process cheat sheet on your desk while on a virtual appointment!
- Utilize the drawing tablet or whiteboard for any visual references with stock market history, TR = I +G, "Big W", etc.
- 4. Utilize other **visual aids** such as the RIS Wealth Calculator, Stock Market History Chart, Longevity Charts, Reverse Dollar-Cost Averaging, etc.



Increasing Annuity vs AUM Ratios in BBI:

- 1. The advisor can always **advise and direct allocations as you see fit**, just like in a face-to-face BBI meeting
- 2. Use the drawing tablet or whiteboard for a visual reference when going through BBI
- 3. Conduct the BBI meeting in the same way as a Face-to-Face BBI meeting
- **4.** If you would like further **coaching support or to see a virtual BBI meeting example**, Rick Bates is available for a scheduled coaching call!