



2021 Webinar Cheat Sheet

Increasing Attendance Ratios:

1. **1st confirmation call** on the day of RSVPing or the morning after (ideally by the advisor, but staff can as well)
2. **1st BombBomb Video RSVP confirmation** via email, after the 1st confirmation call 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, after making the 2nd confirmation/reminder call
 - 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. patrick@peasongroup.com
 - b. holly@peasongroup.com

Increasing Appointment Kept Ratios:

1. **1st confirmation call** the day the appointment is scheduled or the morning after (ideally by the advisor, but staff can do this as well)
2. **1st BombBomb video confirmation** via email, after the 1st confirmation call 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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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:

1. 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!
3. 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.



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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!