

# connect



**Producer  
Insights™**



# Background



20 Years Training Human Dynamics

15+ Years in Financial Services

Thousands of Producers Trained

Average Closing Increase of 35%

How did I get here?



# Three Ways to Grow Your Business.....Starting Today! Grow Your Business Starting Know your Numbers

Understand the Buyers Process

Know your Customer Better than  
They Know Themselves



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# Three Ways to Grow Your Business.....Starting Today!

## Know your Numbers



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# Three Ways to Grow Your Business.....Starting Today!

## Know your Numbers

Gap Value  
\$ \_\_\_\_\_

When you Lose, Why do you Lose?

Top Three Objections:

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# **Know your Process**



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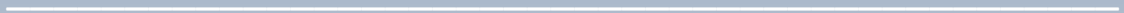
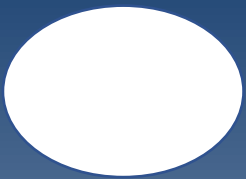
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Three Ways to Grow Your Business  
Starting Today!

# Know your Process

## Your Process vs Buyer's Process



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# **Know your Prospect**



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# Three Ways to Grow Your Business Starting Today!

## Know your Prospect

### Better than they know themselves!

Tone

Pace

Assigning Homework

Key Focus

Strategy

Biggest Asset

Decision Making

Making a Change

What to Avoid

Motivating to a Decision

Adapting Your Style to Suit your Prospect

Mindset

Strokes and Compliments



Delivering "The News"



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# Three Ways to Grow Your Business Starting Today!

## Know your Prospect



Your next clients  
have arrived for  
their  
first appointment  
with you

### Should You?

Make small talk and ask about their family.

Take time to talk about your education, experience, and expertise in the financial services industry.

Explain the "fine-print" on each page as you go through your presentation.

Focus on how your products will change their lifestyle and impact their future.

Show them how unique your solution is. Explain that most people will never know about this great option.

Slow down and see if they have any ideas. Get them talking about their concerns and questions.

Push for a decision right now while they are sitting in front of you. Time kills deals - right?

Send them home with a list of "to-do" items that they can bring back to you at the next meeting.

Yes No

| Yes | No |
|-----|----|
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# The Producer Insights Report

Producer Insights™ Report for:  
ABC Financial Planning

Frank Dell'Orfano  
fdellorfano@gmail.com  
2/9/2019

Frank's Profile Graph

| Category     | Percentage |
|--------------|------------|
| Results      | 37%        |
| Rules        | 99%        |
| Relationship | 10%        |
| Routine      | 100%       |

| RESULTS  | RULES   | RELATIONSHIPS  | ROUTINE   |
|--|---|--|---|
| Decisive<br>Responsive<br>Competitive<br>Strong Willing<br>Ambitious<br>Determined | Balanced Judgment<br>Accurate<br>Fast<br>Cautious<br>Systematic | Sociable<br>Optimistic<br>Cautious<br>Warm<br>Enthusiastic<br>Magnetic | Stable<br>Loyal<br>Reliable<br>Consistent<br>Patient<br>Resistant to Change |

ABC Financial Planning

Communication Plan for Frank

Based on his responses, Frank is likely to have a communication style which lends to the following characteristics. Utilize the following suggestions to make a strong connection with him.

**RULES (99%)**

Identifying Reality - Frank will not be pushed or rushed. He will have questions and maybe even little "tests" for you to verify your knowledge and expertise. Do your homework and know your stuff as there may be big opportunities with this style.

Always Right - Frank likes to be right and he usually is. He has done his homework. Do not give your standard sales pitch unless it is flawless. This style loves to catch inconsistencies in your assertions and can quickly lose respect for you.

Perfection - Frank loves things to be right and perfect. He will go to great lengths to complete a task perfectly. This can sometimes be a detriment as it may not be completed in a timely manner.

Analysis - This style will analyze and study before agreeing to a change. Sometimes it may not be the numbers as much as what they feel is the right thing to do.

Acknowledge their time and effort. This style takes great pride in doing the work and achieving the goal through substantial effort.

Open vs. Guarded and Direct vs. Indirect

Open People Oriented

Guarded Task Oriented

ROUTINE

RULES

Indirect Slower Paced

Know about Frank's style, does he tend to be Direct or Indirect? Now utilize the following adjustments to YOUR natural style when

**To Slow Down Your Pace:**

- Talk, walk and make decisions more slowly
- Ask Frank his opinion and acknowledge it
- Share the decision-making process
- Allow for alternatives and Utilize Generalities
- Soften Your Tone, Do Not Interrupt
- Refrain from Criticism, Challenge or Pushiness
- Choose Your Words Carefully when Disagreeing

NOTES

NOTES

ABC Financial Planning

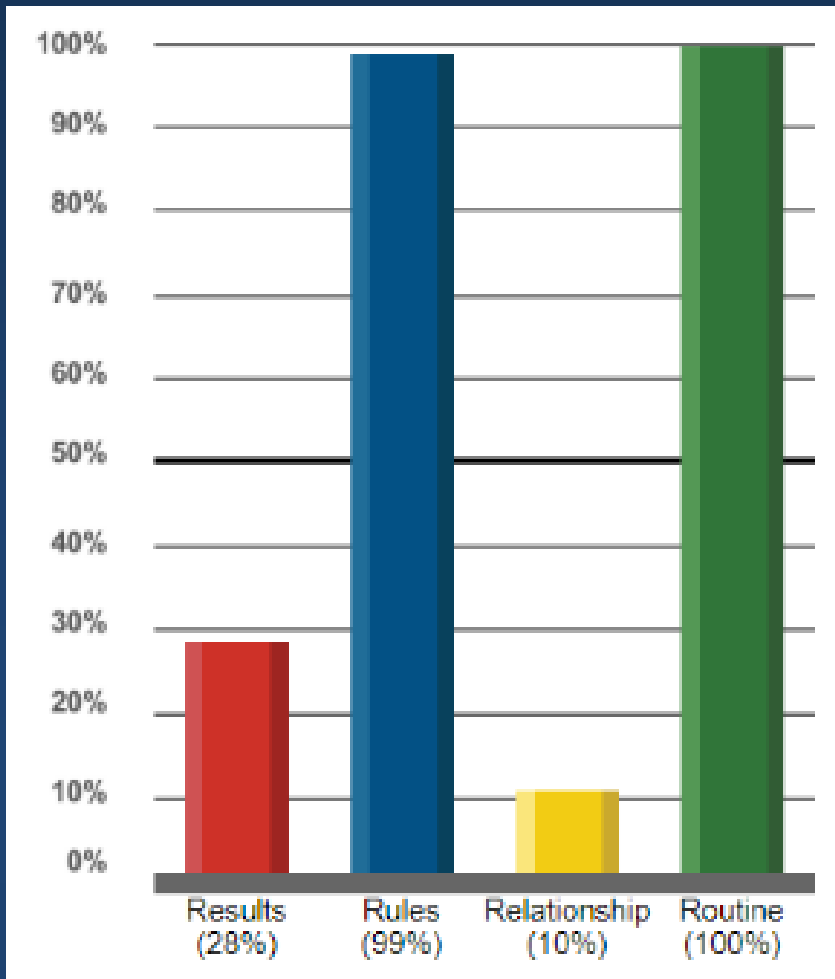


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The Energy Line shows the level of fluency with each style. The higher the bar, the more fluent you are!

# Natural Gifts

## Profile Graph

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Three Ways to Grow Your Business Starting Today!

# Know your Prospect



**RED**



**BLUE**



**YELLOW**



**GREEN**

**Tone**

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**Energy**

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**Key  
Motivator**

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**Reaction**

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**Never  
Ever**

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# Notes

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