

## **BUILDING MOMENTUM AND PROSPECTING**

### **Building Momentum – Steps for Success**

1. Go through the sales process yourself
2. Set Goals / Create Action Plan
3. Participate in Corporate / Team Meetings and Trainings
4. Learn the script / Have an invitation
5. Create a list of people you know / prospect list / how prospect
6. **Most important step** – Get Out There and Talk to People!!!

## Build Momentum

- **Treat this as a business**
  - Set Goals (SMART)
  - Create an action plan
  - Create your marketing / prospecting plan
  - What are you going to do to reach your goals? What behavior / activity will you complete on a regular basis to reach your goals?
  - Be consistent with behavior / actions
  - Track your results, look at conversion rates, see where you excel and where you may need some help
  - Use Systems
  - Prioritize and don't let other's priorities be your own

## Build Momentum

- **Consistency**
  - Need to have consistent action
  - Even if it feels like nothing is happening, KEEP DOING IT! Things will sneak up and explode
  - Concentrate on productive behavior, not busy work!  
Ask yourself – will this put money in my pocket? – Will this help me accomplish my goal?
- **Follow Up**
  - 80-95% of sales are made after 5+ contacts with the prospect
  - Keep a list
    - Keep notes
    - Mark last contact and when next f/u is

## Build Momentum

- **Do the thing you dread the most** - The thing we dread the most, is most likely the thing we need to do the most
  - We all have something.
  - For me – it was my chicken list
  - Call On Your Chicken List!!!!

## ALWAYS Fill Your Pipeline

- **Short-Term**
  - People you will close in 1-14 days
  - Initially 50-60% of your time is spent here
- **Mid/Medium-Term**
  - People you will close in 30-60 days
  - Initially 30-35% of your time
- **Long-Term**
  - People you will close in 3-6 months
  - Initially 10-15% of your time
- These percentages will shift as you build your business

## Most Importantly...

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## Prospecting

- Current BOB/SOI
  - Make a List and Review Regularly
  - Create a List Often – Use a Memory Jogger
  - Put Them on Email Drip and CALL
- Attend Networking Events
  - Chamber Events, BNI Groups, Mixers
  - Have a 30 Second Commercial Ready!
  - **Must be consistent**
- Print Advertisements
  - Newspapers
  - Magazines
  - Postcards
  - Real Estate Magazines (Homes Illustrated)
- Hand Written Notes and Thank You Cards
  - Three per day!
  - Use SOC
- Door Knocking
- Purchase Leads

## Prospecting

- Booths at Local Events
  - Home Shows
  - Chamber Events
  - Career Fairs
- Attend or Have a Booth at Professional Seminars
  - Loan Officers, Realtors
  - CPAs, Financial Planners
  - Insurance Conferences
- Lunch and Learns
- Bagel Day
- Call Realtor Signs
- Open Houses (Captive Audience!)
- Business Section – New Platinum Club Members – Send a Congrats Note
- Create Strategic Alliances
  - Offer Referrals!
- Email Drip Campaign
- Email Blasts
- Telemarketing

## Prospecting

- Call on Business Cards
  - Your business card ran across my desk – do you have a minute?
- Branding
  - Branded Clothing
  - Name Tags
  - Don't be a Secret Business Owner!
- Mike Krach Approach –
  - Will that effect what I do for a living?
- Google Advertising
  - Google Places
- Pay Per Click (AdWords, Facebook)
- Three Foot Rule
- Restaurants, Grocery Stores, Cell Phone Reps, Door to Door Sales People
  - You did a great job today. Are you interested in making some extra money – I am looking for some agents
- Follow Up
  - Remember, most sales are done after 5-12 contacts!
- Call Past Clients!!!
  - Make sure they are using it
  - Ask for Referrals

## Prospecting

- Sponsor High School Sporting Events
  - Coach Promotes You
  - Branding
- Co-Sponsor Events with Those in Similar Professions
- Fish Bowls – Have a Drawing to Win a Free Lunch
- Car Magnetics / Window Ads
- Two People in a Full Elevator, DMV
- Booths Outside Grocery Stores
- Golf by Yourself (Get Paired Up)
- Radio Ads
- Churches / Religious Groups
- Job Ad in Local Paper / Internet
- Approach Business Owners
  - Offer as an Employee Incentive!

## Prospecting

- How to Get In Front of More People This Week
  - Call 10 friends and ask each person – Can you help me a minute?
  - I am showing people how to pay off their mortgage and other debt in as little as 1/3 to 1/2 the time. I have found that people in certain areas are great strategic alliances. Can you tell me who your Realtor, Insurance Agent, Financial Planner, and Accountant Are? (Get name / number)
  - By the way, out of curiosity – do you still have a mortgage?
  - Now, you have 40 warm leads to contact

## Remember

- Keep it simple
- Follow the script
- Do not vomit on people!!!!
  - People don't care what you know until they know you care
  - Your job is to generate enough curiosity to get them to run an analysis
  - Always circle client back to setting an appointment
  - **Do NOT be the person with all of the answers**

## What Do You Need to Do?

1. Go through the sales process yourself
  - Be a Product of the Product
2. Set Goals / Create Action Plan
  - How many people per month would you like to help?
3. Participate in Corporate / Team Meetings and Trainings
  - Stay aware and engaged
4. Learn the script / Have an invitation
  - Practice, but, no need to be perfect
5. Create a list of people you know / prospect list / how prospect
  - Easiest to start with people you know
6. **Most important step** – Get Out There and Talk to People!!!
  - People won't know you have a solution until you tell them!
  - Constantly fill your pipeline

Best Way to Generate Leads Is...

**TALK TO PEOPLE!!!**

**Carry on a Conversation!!!**

Don't wait until the script / commercial is  
perfect – it never will be