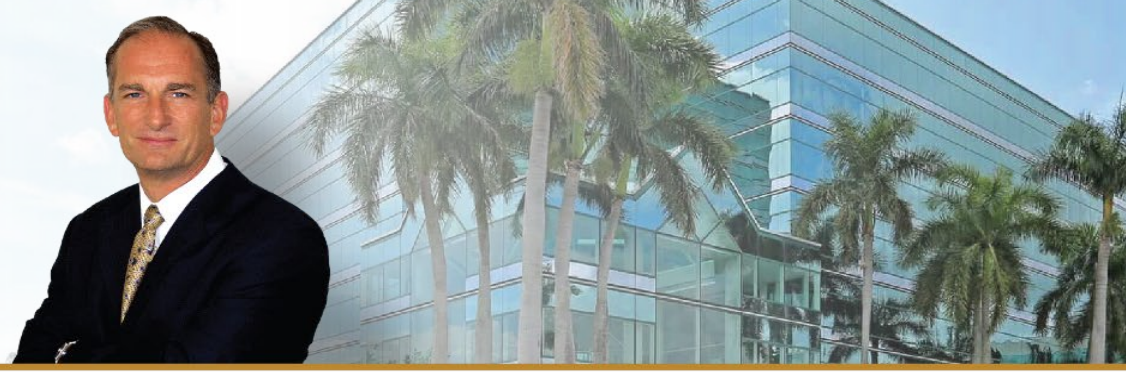
Sound Income Group

DIAL UP WITH DAVE



In preparation for our August 11–12 sales training event in Connecticut, I've recorded a video focusing on key fundamentals of the Simplified Sales Process. I urge you to watch it and take notes, so you'll be well prepared to get the most value possible out of next month's event.

It will be structured around roleplaying and focus on the specific language you should be using throughout the SSP to help ensure the close. We've already held one such training event, and it was a great success. Next month's version will undoubtedly add even more value because we've applied key learnings from the first event to make this one even better.

But it's important that you come prepared. That's why I took the time to create a longer and more targeted coaching video this month, and why you need to watch it. Again, this training will cover fundamentals, so it's applicable to anyone using or planning to use the Simplified Sales Process and Retirement Risk Report. In the video, I roleplay a meeting after giving a quick refresher on the basics of starting a first meeting.

Those basics begin with:

- **Frame the Meeting in Two Ways:** 1) Resell the benefits of the Retirement Risk Report. 2) Let them know what's going to happen during the meeting. Once you've finished, ask, "Is there anything else you think you would like me to talk about today?" If they say yes (long-term care coverage, for instance), assure them you'll find time to answer their questions about that, then move on.

- **The Fact Finder (CFQ):** Spend about 15–20 minutes on this and keep it simple. Use round numbers. Get the information and dollar amounts you need to help you identify the right tracks to use.

- **Categorization:** Put them in the right category based on whether they're retiring soon, ten years from now, or are already retired, and whether they are a single or multiple advisor prospect or a do-it-yourselfer. Be careful at this stage: don't try to dive too deep or cover too much, or you could end up intimidating them and pushing them away.

Their retirement time frame will be especially important in determining what tracks, language, and potential tools (i.e., the disparity of outcomes income calculator) you'll use as the meeting proceeds. In my training video, I roleplay a standard meeting in which the prospect is planning to retire within just a few years.

Again, watch my July coaching video to prepare for next month's training event, and reach out to the coaching team if you have any questions.

Dave