

Obtain Favorable Introductions



*Use the Favorable Introduction
Conversation*

Favorable Introduction Conversation

(Member's name), thank you for the opportunity to work together, and congratulations on (starting your financial plan, etc.). What did you find most valuable about this process?

I'm glad you're happy with our process and results. We've found the reason most people don't make financial plans is they simply haven't taken time or found someone they trust.

Now, there's one thing I need your help with. Could we take just a few minutes to think of people you care about who could benefit from this same process?

(Refer to fillable graphic) With these groups in mind, who do you think could benefit from talking with me? Let's start with your immediate family...

(Proceed through each group)

Closing

Thank you, (Member's name), for suggesting these people to me. Before I contact them, I would appreciate if you could let them know I will be calling. With your introduction, they'll be expecting my call.

I'd like to follow up with them within a few days. When do you think you could reach out to them?

Thanks again for trusting me. I promise that I will treat your friends and family with the same level of respect and professionalism I have shown you.

The Favorable Introduction Conversation is meant to be used as a point-of-sale conversation. This is the ideal time to ask for favorable introductions, but the conversation can be initiated any time value and service has been provided. If you have earned the right to ask for introductions, whether it's at the point-of-sale, upon certificate delivery, or at a fraternal event, the Favorable Introduction Conversation is applicable.

How do you know if you've added value and service for your client? The best way to find out is to ask. Have a value discussion with your client to begin the process of asking for favorable introductions. First, thank your client and find out if they are better off now than what they were before. *"(Member's name), thank you for the opportunity to work together, and congratulations on (starting your financial plan, etc.). What did you find most valuable about this process?"*

Get your client thinking about how they have been positively affected by the planning you have done.

After your client has answered, begin the discussion by reaffirming their decision to work on their financial planning with you. *"I'm glad you're happy with our process and results."*

Now that you have gotten your client to think about the value you've provided, it's time to connect the work you've done for your client with the work you'd like to do for others.

Ask for favorable introductions, coaching your client by letting them know what a quality introduction is: *"We've found the reason most people don't make financial plans is they simply haven't taken time or found someone they trust."*

Having affirmed the clients trust in you and our process, they should be willing to introduce to people they care about. People like to help people they trust. *"Now, there's one thing I need your help with. Could we take just a few minutes to think of people you care about who could benefit from this same process?"*

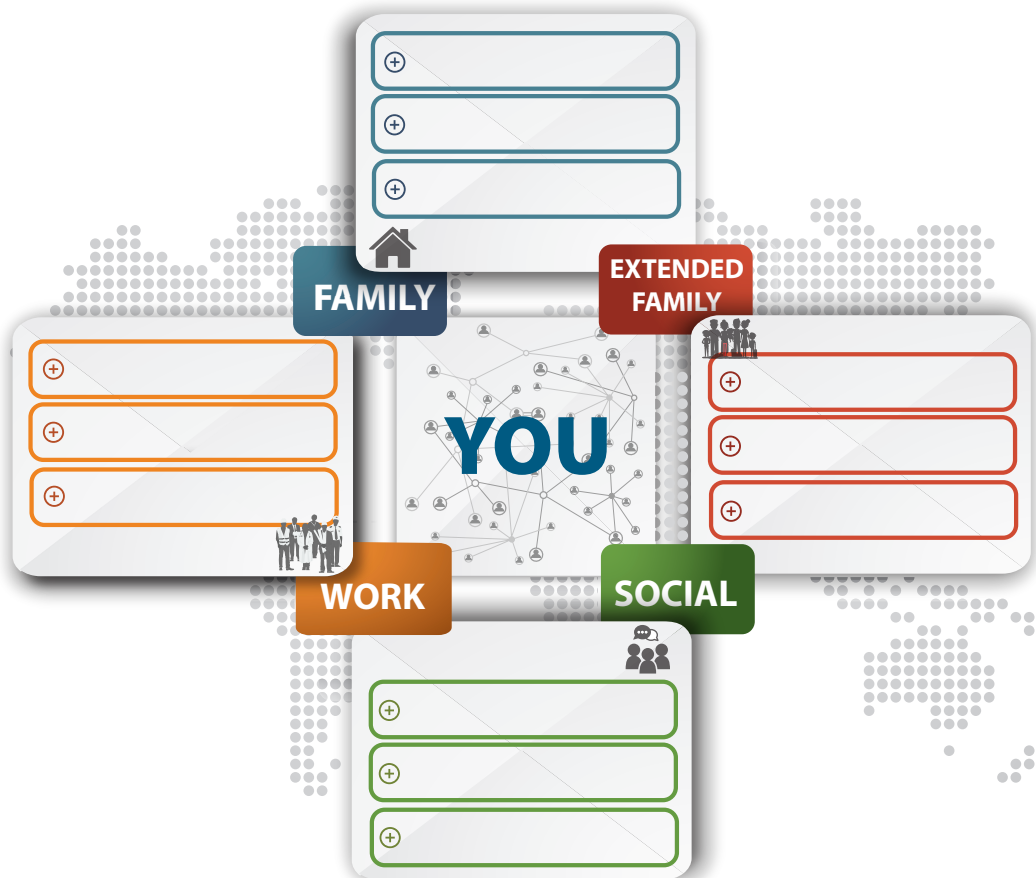
Refer to the Favorable Introduction Graphic to help guide the client. *"With these groups in mind, who do you think could benefit from talking with me? Let's start with your immediate family..."*

Probe until you have gathered as many names as your client is willing to provide. Then, go back and ask qualifying questions to learn more about that person. (How long you've known the person, family information, where he/she works.)

Once the names and information have been recorded, it's important for your client to introduce you so they are familiar with your name and more at ease when you call. Examples of text/email introductions are on page 3 and 4. **"Thank you, (Member's name), for suggesting these people to me. Before I contact them, I would appreciate if you could let them know I will be calling. With your introduction, they'll be expecting my call."** Your client's only job is to open the door, not to explain your job.

Maintain control of the process by giving your client a timeframe in which you'll contact their friend or family member. **"I'd like to follow up with them within a few days. When do you think you could reach out to them?"** Write it down.

As you conclude your favorable introduction conversation, reassure your client as to how you plan on working with the people they have named. **"Thanks again for trusting me. I promise that I will treat your friends and family with the same level of respect and professionalism I have shown you."**



Introduction Emails (From Client)

1) I just met with (your name) from Modern Woodmen to review my financial goals and start planning. When he/she mentioned working with people important to me, I thought about you. I took the liberty of giving him/her your information and he/she will reach out. I would encourage you to take time and meet with him/her. I promise you will be happy you met. Very beneficial!

2) I hope all is well with you and your family. I've taken the liberty of asking (your name) from Modern Woodmen to give you a call. He/She did some outstanding financial work for me and I thought you should at least know about it. So, please do consider meeting with him/her, even if only for 30 minutes. I think he/she will impress you the same way I was impressed.

3) I hope you don't mind however I gave your name and phone number to (your name), who is a financial representative with Modern Woodmen. He/She has helped us plan for the future so our family is taken care of and I thought you would benefit greatly from the work he/she does. He/She works with any budget and he/she would help design a financial plan that's comfortable for you, and the great thing is it's at no cost to meet. He/She will be reaching out to you shortly so please be expecting him/her!

Introduction Emails (From Rep)

Hello (prospect's name),

(Client's name) asked me to reach out to you because they thought you would benefit greatly from the work I do as a financial representative with Modern Woodmen. I work with a lot of families just like yours by helping them develop and implement plans to provide financial security. I wanted to extend my services to your family at no cost. Do you currently have a financial representative who meets with you on a regular basis?

Introduction Texts (From Client)

1. FYI, I gave (your name) from Modern Woodmen your number to set up a meeting with you. He/She's been really helpful with my financial plans.
2. Thought you'd be interested in a meeting with (your name) from Modern Woodmen. He/She did a great job creating a financial plan for me. I gave him/her your info.

Notes about Texts from Client

- Leave it up to the client to text as they would naturally communicate with the individual.
- Providing your phone number to the potential client in the initial text should be up to the individual. The potential client may ask the current client for it, but it might be unnecessary at first.

Introduction Text (From Rep)

1. Hi, this is (your name), from Modern Woodmen. (Client's name) asked me to contact you about discussing your financial plans. When are you available this week?
2. Hi, this is (your name), from Modern Woodmen. Did (Client's name) tell you I'd be contacting you? I can meet with you this week, let me know what day works best.

Notes about Texts from Rep

- Keep these texts simple and professional
- Avoid acronyms and other text message shorthand (examples: "w/", "&", "u", "thot", "2" for "to", etc.)
- Don't dive into sales conversation here; schedule a meeting time and place.

