ENGAGEMENT SKILLS FOR FINANCIAL PLANNERS WORKSHOP – AGENDA

9.00 – 10.00  SETTING & ACHIEVING GOALS
10.00 – 11.00  THE IMPORTANCE OF ATTITUDE
11.00 – 11.15  MORNING TEA
11.15 – 12.15  THE STRUCTURE OF A FIRST CLIENT MEETING
12.15 – 12.45  KEY ASPECTS OF THE SECOND CLIENT MEETING
12.45 – 1.15  LUNCH
1.15 – 2.15  WATERPROOFING & POST MORTEM OF THE LOST SALE
2.15 – 3.15  SALES TECHNIQUES TO MAXIMISE CONVERSION RATES
3.15 – 3.30  AFTERNOON TEA
3.30 – 4.00  HANDLING OBJECTIONS
4.00 – 4.30  ESTATE PLANNING – RULES OF CLIENT ENGAGEMENT
SYNOPSIS OF SESSIONS

SETTING & ACHIEVING GOALS

“It is just as hard to get somewhere if you don’t know where you are going as it is to come back from somewhere you’ve never been.”

This quote sums up the importance of goals and it demonstrates that, if you don’t have a clear purpose on a daily basis, then you will only succeed by accident.

This session enables you to understand the importance of having goals. It will also detail the essential criteria that need to be met for something to really be a goal (rather than something you would simply like to have), and it will explain how you can guarantee the achievement of goals and make doing so easier rather than harder.

THE IMPORTANCE OF ATTITUDE

This session will help you to understand that it is first and foremost your mindset that will be the single biggest determinant of call/appointment outcomes.

An outline of the “Cycle of Success” will demonstrate the pivotal role that the right attitude plays in achieving the end result you desire.

You will also learn how you can overcome the biggest barrier to your success, namely apprehension.

Finally, you will gain an understanding of what “communication” really is by appreciating its component parts and the relative importance of those component parts in the art of communication.

THE STRUCTURE OF A FIRST CLIENT MEETING

Many advisers lack structure in their initial client meetings and tend to “wing it” each time they sit down with potential clients.

This session will outline 4 distinct stages to a first client meeting, what needs to be covered off at each stage and the targeted outcomes along the way.

The two major benefits of having structure in the first client meeting are the confidence it will give you from the word go and a predictability of outcome – namely a second client meeting close to 100% of the time.
KEY ASPECTS OF THE SECOND MEETING

Although the first client meeting is essentially where business is gained or lost, many advisers lack structure in their second client meeting and simply rely on the presentation of their recommendations to secure the business.

This session will identify NINE separate aspects of a second client meeting that will not only guarantee securing the business, but will also achieve numerous other beneficial outcomes, which will add valuable layers to your client relationships.

WATERPROOFING AND POST MORTEM OF THE LOST SALE

“Waterproofing” is making sure that appointments are real and will be kept and that business is real and will stay on the books.

This session will provide effective techniques for maximising the amount of client appointments that are kept at the first time of asking.

It will also deliver a number of strategies for waterproofing the business at 3 different stages of the process, namely at the point of sale, between the submission and completion of the business and at the “policy explanation meeting”.

SALES TECHNIQUES TO MAXIMISE CONVERSION RATES

This session will explore the psychology of selling and it will identify 5 key building blocks that you need to put in place during the client engagement process in order to maximise the conversion rate from prospects to long term clients and make business a natural consequence of your initial advice process.

HANDLING OBJECTIONS

In an ideal world you have fine tuned your client engagement process to the point where you no longer get objections, but whilst you are on that journey, it is important you understand the psychology of objections.

This session will identify the reasons why people give you objections as well as the procedures for overcoming them, and it will provide a variety of techniques designed to facilitate business when it is there for the taking.
ESTATE PLANNING – RULES OF CLIENT ENGAGEMENT

Making sure the right amount of money goes to the right people at the right time should be an integral part of the financial planning process, but many advisers shy away from this crucial topic, mainly due to a perceived complexity that takes them outside their comfort zone.

This session will reveal that you don’t need to have the knowledge and expertise in this area yourself in order to achieve the appropriate end result for your client – you just need to know people who do! It will outline the rules of client engagement that will fulfil your primary role as facilitator in the process.