



FRIENDS INTO CLIENTS— CUSTOMIZED SCENARIO VERSION

Objective

Develop a comfortable approach to tactfully ask people you already know at some level to become clients. *(Scenarios most useful for the audience are chosen by the manager beforehand.)*

How?:

Exploring selected scenarios by examining points in your favor, their concerns, your concerns, message you want to communicate and the message you want to avoid. Each scenario has an opening, conversation to mark your point and closing.

What Does the Seminar Contain?

Structure:

- Introduction of points listed above

Seven Stages in the Development of a Relationship:

- Seven steps between strangers and close friends who do business
- At which stage has your friend *already decided* if they would do business?

Specific Scenarios: Manager chooses four based on audience

- Very close friend
- Former Co-worker from past career
- People you know casually
- Family members at a distance
- Alumni from college
- Person known in youth, suddenly successful
- New friends met on vacation
- People known on the golf course
- Friends at the gym
- About to retire

Action Plan:

- Step-by-step format with measurable deliverables at each step

Links to Articles Highlighting Strategies From Seminar:

Softly, Softly Approach *FT Publications, Financial Adviser 12/8/11*

<http://www.ftadviser.com/2011/12/09/ifa-industry/your-business/softly-softly-approach-SjHrp7xsXidMfm2cic7rdI/article.html>

Friends Like These *FT Publications, Financial Adviser 5/13/10*

<http://www.ftadviser.com/2011/10/27/ifa-industry/advisory-companies/friends-like-these-iv5zppM3kLvd8tiVB7LtCO/article.html>

Tapping the Old Boy's Network *FT Publications, Financial Adviser 11/20/08*

<http://www.ftadviser.com/2011/10/29/ifa-industry/people/tapping-the-old-boy-s-network-8EZCSegmGDMoPcj0fjSV4J/article.html>

I'll Be There for Your Investment *FT Publications, Financial Adviser 2/16/06*

<http://www.ftadviser.com/2011/10/30/i-ll-be-there-for-your-investment-qSbDXDjKrzc85qjtLyK42H/article.html>

Friend In Need of Financial Expertise is a Friend Indeed *FTP Publications, Fin'l Adviser 2/8/07*

<http://www.ftadviser.com/2011/10/30/a-friend-in-need-of-financial-expertise-is-a-friend-indeed-EFKb4fojlmOInfWJg6c75M/article.html>

Turning Friends into Customers *FT Publications, Financial Adviser 3/9/06*

<http://www.ftadviser.com/2011/10/29/turning-friends-into-customers-maGejhqllgiXPPmQN9bejM/article.html>

How Can Friends and Family Help Attract New Clients? *Prof'l Adviser (UK) 4/1/10*

<http://www.ifaonline.co.uk/professional-adviser/feature/1599340/dinner-chance>