



HOW TO ASK FOR THE ORDER

Objective

Enable advisors and agents to move beyond presenting information and alternatives to closing the sale. Proceed beyond "I'll think about it" *Accepting the recommendations on your timetable.*

How?:

Focusing on ten closing strategies; when each is appropriate. Words used to ask for the order and communication after the sale.

What Does the Seminar Contain?

Results of research based on advisor surveys and interviews

- Why Don't Prospects (and Clients) Make Decisions?
- When Are They "Ready to Buy?"
- How Do Advisors Make Decisions Timely?

Before You Meet: *What factors work in your favor?*

- Why have they decided to meet with you?
- How much data can you expect to gather at the initial meeting?
- Can you go back for additional data afterwards?
- Are they serious?

Ten Closing Strategies Utilized By Successful Advisors in the field

- Includes scenario, steps and approaches to implement. Also considers type of relationship for best fit, benefit to advisor and the client motivator it addresses.

How Do Advisors "Ask For the Order"?

- Four approaches used to gain approval and complete paperwork
- "What words do they use?" – Six closed-end expressions utilized in the field where "No" is the uncomfortable answer.

After The Order

- Don't win the sale and lose the relationship

Action Plan:

- Step-by-step action plan with measurable deliverables

What Do Advisors Say?



- *"His experience and understanding of the business"*
- *"Examples very detailed"*
- *"Different ways to ask for the business"*

Links to Articles Highlighting Strategies From Seminar:

The Illusion of Free Will *FT Publications, Financial Adviser (7/29/10)*

<http://www.ftadviser.com/2011/10/27/ifa-industry/advisory-companies/the-illusion-of-free-will-upZaZulQgdJBxYkQ7XaeII/article.html>

Making That Someone Say Yes *FT Publications, Financial Adviser 4/13/06*

<http://www.ftadviser.com/2011/10/30/making-that-someone-say-yes-aK1IhiPq6oBluzcInrLyHN/article.html>

Win Over The Mind & The Assets Will Follow *FT Publications, Fin'l Adviser 6/8/06*

<http://www.ftadviser.com/2011/10/30/win-over-the-mind-and-the-assets-will-follow-mqgcBatTW69fpzqV3HZnMO/article.html>