

The **FUTURE ORDER BOOK**

So very simple, you will wonder why you haven't done this already. If you have, well done! Our research and experience shows that most advisers do not have a FUTURE ORDER BOOK.

You need a diary – ideally MICROSOFT OUTLOOK - or paper-based and desk size at the very least. It should span at least 12 months from this month onward.

Now, in it you forward track all of the following:

- Policy anniversaries
- Client birthdays
- Future prospects to call (maybe they said call me back in 3 months etc)
- Client annual reviews
- Salary Reviews
- Wedding, birth, death.

Having this system running will give you a WARM FEELING about the future around activity... and you will wonder why you didn't do it before.

The technique

This is based on *the 3 Times Convincer*. Psychologically, most people get used to an idea or message if they see it at least three times.

So, if the anniversary or date to ideally see **your client** is in December, then send them a message in October telling them their review, for example, is coming up in 70 days. In November with, say, 40 days remaining remind them again, confirming how long they should set aside and what documents to have ready. Finally with 10 days to go, call them to arrange the meeting. You will find them expecting your call and ready to see you!

Of course, where **prospects** are concerned you should avoid the 3 Times Convincer and simply call them.

E-mail us with your success stories!

Every success,

SANDRO & GLEN