

Club Forte-Nine

CREAM LIST

Recently a client we were coaching rang up in a considerable state of excitement. She told us the story of how she had met an old client of hers on a train, and, after a while, realised there was a lot of business to be done. Nothing too unusual you may think. Previously, this client had been someone the adviser was convinced had no value in terms of new business and had 'written him off' her prospecting List.

We asked that she return to her client base and create a WOO CHART of a very different order. This one she was to call her CREAM LIST. In other words any business coming from this list of prospects would be 'cream on the cake'.

Some days later she explained how, by making a list of people she assumed would not bear fruit using DIFFERENT PARAMETERS, she ended up securing 12 meetings, and, from that case, \$16,484 of commission in addition to her usual monthly production. She was amazed; we were not.

This month we ask you to create a CREAM LIST.

Write up every client or person that you know who you think HAS NO FURTHER BUSINESS TO DO WITH YOU.

Now call them and arrange to see them REGARDLESS. Tell them it's not just a review meeting - you'd actually just like to see them after what might have been a long time.

Now use the WOO CHART first followed by CREAM QUESTIONS such as:

- 1 Who have you met recently that I don't know - and would be open to a discussion?
- 2 Have you or has anyone you know come into a windfall or unexpected sum?
- 3 If we changed places, who would you ensure you arranged a meeting with first?
- 4 Who do you know that runs a business?
- 5 Who do you know that has a goal or ambition yet to be achieved?
- 6 Who have you forgotten in the past to recommend to me?
- 7 Who do you most care about who's not being looked after by any adviser?

You will be surprised that, by going through these questions and a structured process, you will unearth 'gold', as it were.

The Prisoner Story

A man was held prisoner of war and tortured. When he was released he was asked how he had managed to stay sane. He explained that there were three types of prisoner:

- a) the pessimists
- b) the optimists
- c) people like him who had hope - which was continuous and never ending.

The pessimists died first, followed by the optimists who had waited for a release date (which subsequently came and went) and then there were people like him who knew they'd make it, though had no idea when...

...but that day eventually came - and sooner than was thought.

We'll leave you to work out the message!

Wishing you every success,

SANDRO & GLEN