

### Overview

*You only get one opportunity to make a first impression. This module brings clarity to the things you must be doing consistently in every new client meeting to ensure your first 10 minutes are a strong start to your relationship.*



This module is focused on Fact Finding and includes content that is purposefully repeated in the one-year Launch curriculum.



## Facilitator Pre-Work

### Facilitator Pre-Work

It is critically important that you carve out 20-30 min. of time prior to leading a Launch session to do the following:

- 1) Review the Guide below.
- 2) Watch the videos from the PRIOR MODULE (so you are prepared to lead the Homework Debrief), as well as the videos from THIS MODULE.



## Review

### Review Homework from Previous Module

Last week's module focused on setting goals and THINKING BIG. Share your perspective on how you "rip off your rearview mirror" when you set goals. Talk about your current goals and more importantly – WHY they are truly meaningful to you. Contrast with examples of when you have been less connected to your goals and the impact that had on your energy and results.

Ask each advisor to share what they did to expand their THINKING BIGGER muscle over the past week, and what they took from it. Encourage the group to consider how they will continually feed their mind around big thinking.



## Watch

Watch **ONLY THE FIRST** Module 46 Video (approx. 11 min.)

- 1) Start Strong



## Discuss

### Questions/Topics to Create Discussion/Dialogue

- Share how your own mindset around leaving your needs at the door and having a curiosity to truly understand a client's story have evolved over your time in the business.
- Reflect on the FF meetings you had over the past 2 weeks. How effectively are you setting up your environment for success? Are you consistently keeping small talk to 2-3 minutes?



## Role Play

### Role Play

Ask for a volunteer who would like to go "toe to toe" with Jim in their approach language. This person should come forward and deliver his/her approach. Immediately after, **watch the second video**: My Approach Language. Ask the group to share feedback on similarities and differences they observed. Comment to how full of "DNA" the advisor's version was, as well the strength of their non-verbal communication. Congratulate him/her on stepping forward.

If time allows, put the advisors in pairs and have them each practice their approach.



## Assign

### Assign Homework

Explain that next week, two advisors will be selected to go "toe to toe" on their approach at the start of the meeting. They should use every opportunity to practice their language to be ready!



**Attention Trainers: We need your feedback!**  
Let us know if this was a \*\*\*\*\* module, or if you found discussion harder to generate than other modules. If you find an error, or if you have any ideas to make this module better – please reach out! [Info@JimEffner.com](mailto:Info@JimEffner.com)