

**Overview**

*Delivering an effective discovery agreement requires the skill of consolidating an hour+ meeting into a clear, concise and compelling summary. It helps ensure you and your prospect are crystal clear on what happens next, and it creates a sense of urgency and desire to move forward. Mastering the art of a skillful discovery agreement will have a dramatic impact on your closing ratio.*



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**

Begin by asking who went “toe to toe” with Jim last week on their approach language. Select two different advisors to come forward. Explain that they are competing for Best Approach. They will be scored by the group on a scale of 1 (ineffective) to 5 (highly effective) in two categories: Language and Delivery. Their language should be full of DNA, and their delivery should be clear, concise and compelling. Flip a coin to determine who goes first. Send the other out of the room while Advisor 1 delivers their approach language. Capture the scores from each advisor in the audience. Then switch. At the conclusion, announce the winning score. Close by reminding the group the reason we spend so much time focused on language mastery in their first year, and how critical it is to continuously work to sharpen the blade throughout their career.

**Watch****Watch the Module 47 Videos** (approx. 13 min.)

- 1) Discovery Agreement
- 2) After the Discovery Agreement

**Discuss****Questions/Topics to Create Discussion/Dialogue**

- Ask the group to share the 3 primary goals of a good discovery agreement. (1) To be able to give a concise summary of the 1+ hour meeting you just completed; 2) To make it very clear what to expect in the next meeting; and 3) To build a compelling desire to see their plan. Share your own experience in accomplishing these in your meetings.
- Talk about why a written discovery agreement sent after the meeting is nowhere near as effective as one delivered during the meeting. Tie back to the 3 objectives.
- Ask how many, by show of hands, are getting commitment for the next meeting before they leave a FF? Discuss the challenges they experience in doing so, and reiterate the impact this has on effectiveness in the close.

**Role Play****Role Play**

Put the advisors into pairs and have each pair take turns role playing a discovery agreement. They can make up the info, or even better – they can use a FF they completed in the past few days. Their partner should give them feedback on how effectively they met each of the 3 goals.

**Assign****Assign Homework**

Explain that next week, two advisors will once again be selected to go “toe to toe” – this time, they will be asked to role play an actual Discovery Agreement from a FF they have in the next week. Encourage them to watch Jim’s video prior to each FF they have to help them stay laser-focused on the three objectives.



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)

**Attention Trainers: We need your feedback!**