

Overview

Most advisors treat this business as logical. The reality is that this business is all about emotion. Getting your clients to take action is difficult. Developing and mastering the skills to help your clients align their emotional state and their logical mind in alignment creates a dramatically different result for our clients, and our practice. Jim gives an example of a story he used to help his clients make an emotional connection to the importance of balancing shorter-term acquisition needs with long-term planning.



This module is
focused on Beliefs.

**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**

Ask for a volunteer to state the 3 themes of FFing from last week's module (A: slow down and be present; seek first to understand; ask great ?s). Ask the group to share their observations of how their FFs this past week were impacted by thinking of these 3 themes prior to beginning each appointment. What % of their FF meetings did they estimate they were talking vs. listening? How do they feel about that number?

Ask for volunteers to share one specific example of where they felt they did a superior job asking the ? to the ? And what they uncovered.

**Watch****Watch the Module 17 Videos** (approx. 9 min. total)

- 1) Emotion vs. Logic
- 2) Stuff Syndrome Story

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

- Share one or more examples from your own experience in learning (maybe sometimes, the hard way) of the importance of the prospect/client connecting emotionally to their financial needs/gaps. Share what you have learned from these experiences.
- Ask the group to think of one specific example that stands out of a FF they took where they couldn't understand why the prospect didn't take action based on their recommendations. Have them apply the "filter" of their emotional connection to how they view that interaction in hindsight. Ask for a couple of volunteers to share their example/reflection.
- Draw back to the recent assignment they had (Module 15) to assess their own financial planning needs (specific to life insurance). How have their own actions (or lack thereof) displayed their emotional connection to their financial needs?

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

Play the *Emotion vs. Logic* video a second time – starting at approx. 1:50 (his demonstration of the "Does that make sense?" language). Put the group in pairs and have them practice using this language. Then, change up the pairs and have them share an example of when they might have used the Stuff Syndrome story, and practice that language, as well.

**Assign****Assign Homework**

- 1) *Remind the group that taking the time to re-watch the videos each week is proven to strengthen learning, retention and results.* Today's video on Emotion vs. Logic is an example of one they could watch weekly to help them stay connected to this concept.
- 2) Ask the group to identify one (or more) meeting(s) in the week ahead where they will use Jim's "Does that make sense?" follow-on language. (Bonus if they also find an opportunity to use the "stuff syndrome" story!) They will be asked to share their results in next week's session.

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

