Module 1

P2P ACADEMY | LAUNCH

Overview

The phone is simply a means to an end – namely, getting in front of a prospective client to take a fact finder. You will examine the beliefs that drive your phoning behaviors, and Jim will share his language and how to most effectively address questions on the phone.

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

Facilitator Pre-Work

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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

If you are starting your very first Launch module ever…

Begin your first meeting by showing the 5-minute Launch Introduction video (if you haven't already done so.) Then, have every advisor open the *Welcome to Launch* email and log into the system so you know there are no issues. If their log in was set up with a non-NM email, have them update their email address on the My Account page. (If advisors have problems with log in, reach out to Briana@JimEffner.com.)

Remind them that they will be receiving an email every Monday morning that will link them directly to the current module's videos so they can easily re-watch as part of their homework. Let them know that you will be monitoring who is logging in to hold them accountable to this expectation.

Review Homework from Previous Module

For those who completed Module 48 and are restarting on week 1: Last week's module focused on logic vs. emotion, and helping clients connect emotionally to their SI need. Their homework was to use Jim's process to calculate the life insurance need and/or the "Does that make sense?" strategy in their FFs this past week. Ask for volunteers (or choose someone) to share an example of where it worked well. Then, ask for examples of challenges – where it didn't work as well as expected. Discuss what they learned from these experiences/what they could do differently moving forward.

Watch

Watch the Module 1 Videos (approx. 8 min. total)

1) The Goal for Phoning
2) My Beliefs on Phoning
3) Phoning Language
4) Handling Client Questions

Discuss

Questions/Topics to Create Discussion/Dialogue

- What is the goal of phoning? What challenges have you experienced in staying focused on this simple goal?
- What was your key take-away from the Phoning Beliefs video? Why did that resonate with you?
- Discuss the difference between a clarifying question and an objection – and tie back to the goal of phoning.
- Share target phoning ratios (dials to reach, reach to appointment set) and the importance of tracking your numbers so that you can fine-tune your effectiveness.

Role Play

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Explain why role play is such an important aspect of their development.
Ask for a volunteer or choose an advisor to role play his/her phoning language.
Provide feedback.

Assign

Assign Homework

Remind the group that repetition is the mother of all learning. In order to improve their craft, they must devote time each and every week to working on their sales skills, and put what they've learned to use in their client meetings.

1) Watch these 4 videos at least 3 times in the coming week.
2) Role play your phoning language and be prepared to demonstrate next week.

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

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