

Business Format System

SCRIPT MANUAL



THE INVITATION

To be successful in World Financial Group, you have to become excellent at extending an effective invitation. You invite people to the Business Presentation Meeting (BPM) at the office; to a one-on-one opportunity presentation at their home; to review their financial situation and create a Financial Dream Map; etc.

In the invitation, your goal is not to present the opportunity and not to sell them anything. Your goal is simply to secure a commitment and a definite time to meet. You need to master the art of the invitation, to be able to extend an appropriate invitation at any given moment in any given situation.

However, enthusiasm and determination will only carry you so far. You also need to know what to say and how and why. You have to master the words of the business.

This mastery is a process. The more you practice and the more you invite, the better you will become.

Some Points to Remember:

1. You must be completely scripted so you know what to say.
2. You must practice the words until they are your own, so that you can deliver them smoothly and easily.
3. You must be familiar with the common objections people will offer and know how to respond.
4. You need to learn how to avoid the “Scenario of Disaster.”
5. You should learn to answer all questions with a statement followed by a closing question.
6. Don’t guess at the answer. If you don’t know the answer, write down the question and get back to them with the correct answer.
7. You must learn to stay in control of the conversation. Often the person asking the questions is controlling the conversation.
8. It is often advisable to “Clear the night before you invite.” Make sure to discover whether the person you’re inviting has scheduling conflicts before you invite them.
9. Whether the person accepts the invitation or not, always ask for referrals by posing the question, “Who do you know who . . . ?” If the timing or the opportunity are not right for them, perhaps they know someone for whom it is a good fit.

The scripts contained on the following pages have been proven effective, and contain the approved wording for your use. Only approved scripts may be used when making contact with a potential recruit. Once you have made the words your own, you will no longer need a written script. If you desire to use a script other than those already approved, you must submit it in written form for approval by the company’s Advertising and Compliance departments.

Top 25 Script for One-on-One presentations (Also known as the ETHOR script)

Once you develop your Top 25 list you want to quickly contact them and schedule a time to meet and share our message. The ETHOR script is a way of securing an appointment to meet them while taking any pressure off of them.

ETHOR stands for:

I'm Excited

I'm in Training

I need your Help

I value your Opinion

Referrals

Hi, _____ (prospect name), this is _____ (your name). (Make small talk.) I don't know if you heard, but I recently started working part-time with a financial services company called World Financial Group, and I need your help.

(Usually they will say, "How can I help?")

I'm really **excited** about the company and what we do for families. I'm going through a **training** program right now that includes classroom training, getting my licenses, and on-the-job field training. My goal is to get my ten field training presentations done in the next week, and I was hoping you would **help** me out. Since I really value your **opinion**, I'd like one of my field training presentations to be with you and _____ (spouse name). You'd be willing to help me out, wouldn't you?

(WFA – usually, "Of course.")

That's great. I knew I could count on you. I'm working with a gentleman/woman who ... (edify Field Trainer/Qualified Marketing Director). We'd like to come by and share with you what we do. Basically your role would be to listen and ask questions. You won't be expected to buy anything. Then, if you like what you see, you could **refer** people to me who might have a need for or an interest in what we do. Sound good? (WFA)

We could come by (give two optional times, e.g. Wednesday night at 6 or Thursday afternoon at 2). Which of those would be better for you, _____ ?

Great! Thanks for being willing to help me out. We'll see you then.

(They may ask, "What is it?" Study the Scenario of Disaster.)

Look, I just got started; I'm brand new. I am probably not the best person for you to ask these questions to. But my manager / trainer will be able to answer any questions you might have when we come by. So which is better for you, (e.g. Wednesday or Friday)?

Top 25 List Script (Inviting to Overview)

Hi _____, this is _____. How have you been? (Brief small talk)

The reason I'm calling is because I'm in the process of possibly making a career change into the financial services industry. As a result, I wanted to get some feedback from people that I know and respect (any adjectives will fit here) and you're one of those people. You might be able to refer people to me if you like what we do. You can also give me your opinion and ask a lot of questions. You'll help me out, won't you?

(WFA) "Sure."

This Tuesday at 7:30 pm and Saturday at 10:00 am we are having overviews that tell our company story and explain exactly what we do. I would like you to attend one of these overviews. Do you have your calendar in front of you? (WFA)

If you could dress sharp (suit & tie) I'd appreciate it. It is important to me that I impress my leader, _____. Sound good?

(WFA) "Sure."

_____, this will also give us a chance to get together, so as long as we are, let's use my gas. I'll pick you up and you can tell me what you think on the way home.

(SAY "THANK YOU" & HANG UP!!! YOU ARE DONE!)

Top 25 List Script (One-on-One appointment)

Hi _____, this is _____. How have you been? (Brief small talk)

The reason I'm calling is because I'm in the process of possibly making a career change into the financial services industry. As a result, I wanted to get some feedback from people that I know and respect (any adjectives will fit here) and you're one of those people. You might be able to refer people to me if you like what we do. You can also give me your opinion and ask a lot of questions. You'll help me out, won't you?

(WFA)

I'd love to tell you our company story and explain exactly what I'm doing. By the way, as part of my certification, the company suggests I bring along an experienced associate to answer questions. Don't worry, you won't be expected to buy anything. So, can I pop by tonight or would tomorrow night be better?

(WFA)

(SAY "THANK YOU" & HANG UP!!! YOU ARE DONE!)

Leader “Top 25 List” Call

Hello _____, this is _____ (Leader’s name) with World Financial Group. _____ (Recruit’s name) had asked me to give you a call. Did I catch you at a good time? (WFA)

Great. The reason I’m calling is because _____ (Recruit’s name) just started with us recently and we were reviewing his / her business plan. He / she told me you are someone that he / she knows and respects (any adjectives will fit here). _____ (Recruit’s name) also mentioned that your opinion means a great deal to him / her. I wanted to give you the opportunity to hear our company story and learn exactly what we do. This Tuesday at 7:30 pm and Saturday at 10:00 am, we are having overviews that tell our company story and explain exactly what _____ (Recruit’s name) is doing with us. You might be able to refer some people to _____ if you like what we do.

Do you have a calendar in front of you? (WFA)

Which time slot would fit your schedule best? (WFA)

If you could dress business professional I’d appreciate it. Sound good?

Wonderful! I look forward to meeting you in person.

Leader Follow-Up Call: Referral Recruiting Call

Hello _____, this is _____ (Leader's name) with World Financial Group. _____ had asked me to give you a call. Did I catch you at a good time? (WFA)

Great. Let me tell you the reason I am calling. _____ (Recruit's name) started with us recently and while reviewing his / her business plan, he / she told me you were the best/most (Use the S.T.E.A.M. method here*) person he / she knows; and coming from _____ (new recruit's name) I think that is quite a compliment. Don't you agree? (WFA)

_____, we are in the financial services industry. Our firm is looking to open new offices in the area in the next few years. We are looking for new talent to train and develop into potential leadership to help us do that. Now I don't know whether there will be an interest on your part, or, for that matter, on our part. But from everything _____ (recruit's name) has told me about you, I think it makes sense that you and I meet, don't you agree?

Do you have a calendar in front of you? (WFA)

(Invite to the BPM)

This Tuesday at 7:30 pm and Saturday at 10:00 am, we are having overviews that tell our company story and explain exactly what we do. Which time slot would fit your schedule best? (WFA) If you could dress business professional I'd appreciate it. Sound good? (WFA)

Can I count on you being there or do you need a confirmation call? (WFA)

Great, I will see you then!

(Or invite for a one-on-one)

I'm available (give two optional times, e.g. Wednesday night at 6 or Thursday afternoon at 2). Which of those would be better for you, _____ ? (WFA)

Great, I will see you then!

* The S.T.E.A.M. method is a means of generating referrals by prompting your prospect with key words. "Who do you now who . . ." The letters stand for Sales, Teacher, Enthusiastic, Ambitious, and Money Motivated.

Top 25 Pre-Contact Script

Once you develop your Top 25 list and discuss it with your leader, give all of your Top 25 prospects a call to let them know they may be contacted. The following script is a good example of how the conversation should go.

Hello, _____ (Top 25 name). (Make Small Talk)

I wanted to let you know that I just started working part-time with a financial services marketing Company, World Financial Group. I'm really excited about the company and what we do to help people. I'm currently going through a training program, but I'm hoping to go full-time with the company in the next six months. I'm working with a gentleman/woman who ... (edify Field Trainer/Qualified Marketing Director). "I was hoping you could help me out. I gave (Field Trainer/Qualified Marketing Director) your name and number as a reference. Can you do me a favor? He/She will probably be calling you in the next few days, and when he/she does, please take a moment to take the call. And if you miss the call, please give them a call back. It's really important to me to impress them.

Thanks. I need to go. Let's be sure and get together soon. Talk to you then.

Character Reference Call (Done by Leader) (5 minutes)

Hello _____ (reference), this is _____ (Leader) with World Financial Group. I am calling because _____ (new recruit's name) has given me your name as a character reference. Do you have a few minutes to answer some questions? (WFA)

How long have you known _____ (recruit's name)? (WFA)

In what capacity have you known _____ (recruit's name)? (WFA)

If you owned your own business, would _____ (recruit's name) be someone that you would want to hire and why? (WFA)

Obviously from our name, we are in the financial services industry and _____ (new recruit's name) will be involved in helping people understand their financial situations and showing them how to manage debt and build assets for retirement. Is there any reason why you would not recommend _____ (new recruit's name)? (WFA)

Also, this position requires integrity and caring about people. Do you feel _____ (new recruit's name) has these traits? (WFA)

Lastly, I don't know if he / she will call you or not, but as part of obtaining his / her training, he / she will be involved in watching 5-10 "live" presentations. Our firm believes that one half hour in the "real world" is worth 10 hours in the classroom. If he / she does call you, would he / she have enough credibility with you that you would help him / her complete his / her training? (WFA)

Is there anything else you would like to add about _____ (recruit's name)? (WFA)

Thank you. I feel very confident about _____ (recruit's name) because of your responses.

Character Reference Follow-Up (Done by New Recruit)

Hi, _____. Thanks for being a character reference for me. I really appreciate it. As you know, I'm training with World Financial Group and I am in the certification phase already! I don't know if my trainer mentioned it to you, but I have to watch at least five training presentations as part of my certification process. I'm trying to get it done this week. Would you help me out by being available in the next couple days for one of these sessions?
(WFA)

Thanks a lot! My field trainer and I look forward to seeing you _____ (date and time). Thanks again!

OR (if they hesitate)

I understand you are busy and that time is very valuable to you. The last thing I want to do is waste your time or mine. The worst thing that could happen from getting together is that you will learn financial concepts that will educate you so that you will never be taken advantage of regarding your finances. And, that could be worth a substantial amount to your family over the next 10 to 30 years. Don't you agree? (WFA)

Great! So would you help me out by being available in the next couple days for one of these sessions? (WFA)

Thanks a lot! My field trainer and I look forward to seeing you _____ (date and time). Thanks again!