cohen brown management group, inc.

It Begins and Ends with the Financial Review

Why the Beginning and the End?

Greeting

1. Client/Member waiting in lobby
   a. Approach client/member
   b. Make eye contact and smile
   c. ***Introduce self***
   d. Shake hands
   e. ***Ask for name – how may I assist?***
   f. Escort to desk
   g. Offer seat

Scriptwriting on introduction and asking for the name

Pre-Positioning

1. Provide a transition to Reactive Probing Questions
2. Provide a differentiation statement
3. Provide your role as the professional
   a. Future contacts
   b. Questions

Scriptwriting for transition using a reference to the inquired product

Scriptwriting for differentiation statement

Scriptwriting for your role as the professional (include future contacts and questions)

The Core of the Financial Review

Client/Member Orientation

____

____

____

____

____

____

The Cohen Brown Law

"It is never the client's/member's or prospect's responsibility to ask you, to tell you, or to understand anything about your products and services – ever. It is your responsibility to educate them."

Conclusion

Summarize the interaction

↓

Clarify and confirm the follow-up behaviors

↓

Thank the client/ member for business; pre-position future Financial Reviews or follow-ups

↓

Make an offer to assist others (referrals)

Summarize the interaction

Clarify and confirm follow-up behaviors

Thank for the business, pre-position future Financial Review or follow-ups

Offer to assist

Put It All Together

Take-Aways