

Video One Workbook

The Best, Fastest and Easiest Way to Get Clients



CLIENTGETTING
P.L.A.N.

Do's and Don'ts of Successful People

Successful people do NOT:

- Sit behind a _____
- Spend cash in useless _____
- Be full of f_____

Successful people DO:

- Align themselves with the proper _____
- Know the more they're _____, the more _____ they'll _____
- Get _____ _____!

Define Terms

P.L.A.N.

– P _____

– L _____

– A _____

– N _____

Lunch and Learn

- A lunch and learn is a _____ presentation usually given over _____. It's _____ and _____ to the _____. The presentation focuses on the _____ and brings _____, _____, and solves a _____.

Why L&Ls?

Why Banks?

Why L&Ls?

- Because they are _____ and _____.
- Attendees are there by _____.
- Prospects come to you _____.
- You can fill a _____.

Why banks?

- Ultimate _____ partner that you never have to pay _____ to.
- Already have _____ _____ as customers.
- Looking for ways to bring _____ to their customers.

L&L Presentation Quick Tips

- It's not about _____
- It's about _____ and solving a _____.
- Leave time for _____ and _____.

Benefits of the Client Getting Plan

- No _____ because there's no _____.
- Someone else does the _____.
- Someone else does the _____.
- You can get started _____.
- Get _____ in just one L&L.
- _____ and _____ to do!

The Challenge

- Think about who you know at a _____.
- _____ them.
- Tell them about _____.
- _____ if they are interested.
- Be shocked by the _____ response!

Next Step

Be sure to check your email in a couple days as video two will be released.

In video two you'll learn Rookie Mistakes to avoid and we'll bust some of the common myths.

Video Two is just as important as knowing the secret to the Client Getting P.L.A.N. that you learned in this video!