



CLIENT GETTING P.L.A.N.

WHAT IS CLIENT GETTING P.L.A.N.

7 - Step System to getting more clients...
By providing L&L presentations
Where the presentation focuses on the client and brings value, education and solves a problem

DEFINE TERMS

P.L.A.N.

Presentation
Lunch
Audience
Network

Lunch and Learn

A lunch - and - learn presentation is a short presentation, usually given over lunch. It's short and straight to the point. Where the presentation focuses on the client and brings value, education and solves a problem.

WHY L&LS

Short & Sweet. Attendees stay committed.
Everyone in attendance is there by choice and interested in what you have to say
Interested prospects come to you naturally Allows you to establish strong credibility

Filling a need
Win - Win - Win
Easy and Fun!

7 Step to Getting More Clients

Step
01

COMPILE YOUR LISTS

- Two Lists:**
1. List of topics
 2. List of bank contacts
 - Do it yourself
 - Hire an outsourcer
 - Start with friends and family

CONTACT YOUR LIST

- Contact your list of bank contacts
- Tell them what you're doing and why they should want to do it
 - Hint: they have a strong need to provide more value to their customers. Bringing experts like you in to give short presentations is a perfect way to do that.
- Schedule the next step: actual L&L or face-to-face meeting.

Step
02

Step
03

CREATE YOUR PRESENTATION

- Do this AFTER you get your L&L scheduled
 - Otherwise you'll spend all your time creating a presentation
- One problem, one solution
- Value add... NOT about you.

CUSTOMIZE, PRACTICE AND PREPARE YOUR PRESENTATION

- Customize your presentation for each L&L
 - Practice by recording your presentation
 - Watch/listen to recording. Memorize it like a song.
- Best Practice: No more than 20-30 minutes
Leaves time for Q&A and networking

Step
04

Step
05

CONFIRM & COMMIT

- Confirm arrangements with bank contact
- Make sure they are committed to the date
- Make sure you're committed.
 - Don't flake out.
 - Be a person of your word

CONVEY YOUR MESSAGE AND CLOSE DEALS

- Deliver the presentation
 - Remember: its NOT about you. It's about them getting a problem solved.
- Closing Deals" really means moving interested prospects to the next step:
 - Ex., Face-to-face meeting or actually buying your products and services

Step
06

Step
07

CONVERT TO A WEBINAR

- After you've done several live L&Ls you can begin testing webinars
- Starting with webinars is NOT recommended
- Webinar Advantages:
 - Don't have to leave your office
 - Get more prospects in attendance
 - Can record it and then use Automated Webinars to get your message out further