

The Jigsaw Puzzle Analogy

This analogy will do a wonderful job of transitioning from the first visit warm-up into the fact-finding process. The most effective, value-added fact finding process is to use the Family Legacy Planner (FLP). This analogy will also help to overcome many of the questions and objections such as:

1. Can't you just send me some information?
2. What are you trying to sell me?
3. How can you do this for free?
4. How do you get paid?

This analogy can be implemented most any time during the warm-up process, though it is most effective when you use it to transition into the Family Legacy Planner.

The Analogy

What to say: “Ron and Mary, I owe you some very valuable information. For us to help determine what information will be the most beneficial for you and your family, we are going to provide you and your family your own personalized Family Legacy Planner. Your Family Legacy Planner will be confidential and personally prepared. It is like a jigsaw puzzle. Let's say you happen to be walking through Wal-Mart and you are in the toys and games section. This beautiful picture is on the cover of a 1,000-piece jigsaw puzzle and it catches your attention. It has a beautiful lake and bright blue sky. You purchase the jigsaw puzzle. Of course you can't wait to turn all 1,000 pieces into the picture that's on the cover of the box. The first step is to open the box and dump out all the pieces onto your table. Then you start putting the puzzle together right? You say no, first we have to turn all the pieces over so the colored side is facing up. Then you start putting the pieces together, right? NO! Then we have to prop the cover of the box up so that we know what all the pieces will turn into.

“Ron and Mary, what if I were to take the cover of the puzzle box away from you? Would you be able to take those 1,000 pieces and put them together and end up with that gorgeous picture? It would be very difficult, wouldn't it? In fact it would be almost impossible. Ron and Mary, the Family Legacy Planner is like a jigsaw puzzle. The Planner will help us, as a team; paint what your current picture looks like. It will also help us to identify what you really want your picture to look like.

“Ron and Mary, 99 times out of 100 the current picture and the one you want are not the same. The Family Legacy Planner will draw those pictures for us. When I deliver your personally prepared, confidential Family Legacy Planner for you and your family; I will show you what your current picture looks like. We will then discuss what you want it to look like. If your wishes are to change your current picture to make it look like what you want it to, we might suggest changing a puzzle piece or two from your current picture. If you choose to change a puzzle piece or two from our puzzle box, the companies that build and provide these pieces pay me, not you! That is why there is never any cost for you and your family to receive the Family Legacy Planner.”

A Few Notes

You would then proceed to start filling out the questionnaire with your prospect. If there is not enough time to finish the questionnaire on your visit, schedule a follow-up visit to finish getting **ALL** of the information. Do not leave the questionnaire behind for the prospect to finish. Two things happen when you actually leave without trying to sell something:

1. You gain a great deal of credibility and establish integrity with your prospect.
2. The relationship building process is greatly enhanced because of the multiple touches the process creates with your prospect.

Why do the Questionnaire

From the agent’s perspective, a completed questionnaire provides you with the prospect’s current financial scenario as well as what their goals and objectives are for the future. You now have the information you need to provide them with the missing pieces to complete their personal jigsaw puzzle.

You have also taken the time to build a relationship with the prospect. By providing a service to them you have established the credibility that is needed to build and form a lasting relationship. This will open more doors for you when you deliver The Planner and ask them to gift it to their friends and family – thus creating for you a never-ending source of referrals.