

### *Top 10.5 reasons to use the Concierge program in lieu of a traditional seminar*

- 1) Pre-qualifying questions – you get to pick the questions, in what order they are asked and which ones determine if the prospect qualifies
  - a. No more feeding the masses
- 2) One-on-one visits are better for building relationships because they offer privacy.
  - a. Meeting one-on-one avoids the “bad apple” at the table ruining the chances of setting visits with others sharing the same table
- 3) The prospect has committed to a visit knowing what the general topics are going to be.
- 4) Only the invitation and bio card have to be approved by compliance
  - a. For securities representatives, this is a huge boon.
- 5) The timing of the visits and follow-up visit are more flexible and spread out over a longer period of time.
  - a. No more having to cram 10-15 visits into 1 week immediately after a seminar; this also stretches out the sales process so that you have some first visits, second visits and sales visits all in the same week
- 6) If someone is on vacation for several weeks, their schedule did not allow them to call sooner, or the weather is inclement; they have not missed your event
  - a. With a traditional seminar, there is a set date – no matter what Mother Nature has in store for that day
- 7) You get to hear the call with the appointment setter as the prospective client goes through the pre-qualification process
- 8) Allows someone who is not good in front of a room to tap into a seminar-like program and get in front of quality prospects
- 9) The reservation system is available 24/7, so no matter what time the prospects calls they will get a live voice
- 10) The calendar system is real-time and web-accessible, which helps eliminate double bookings
- 10.5) The planning process is so much easier than planning for a traditional seminar.
  - a. No more needing to find a restaurant with a big enough room, or planning 6-8 weeks in advance of the event, or worrying about your presentation making it through compliance in time for your seminar, or worrying about the maximum number of attendees, or what to do if there is overflow, or getting the food order to the restaurant, or making sure there are enough food choices to please everyone attending, or making sure your computer is working, or the projector is packed, or the lighting will be okay, or there won't be noise from other parts of the restaurant, or people coming late, or people leaving early, or etc...

Call us to discuss how this program can help you reach your financial goals. Our number is 888-626-9887 and we will help you start the planning process for your concierge program.