

Episode #310 – How to Inspire Your Clients to Take Action

Hello and welcome back to another episode of Money Script Monday. My name is Allee Marchini and today we are going to talk about How to Inspire Your Clients to Take Action.

I recently attended a webinar training from a company called Leadpages, and if their name told you anything about what they do, you probably could guess that they specialize in high-converting landing pages and websites and other types of conversion tools. The training focused on conversion copywriting specifically, but as I was listening to the presenter, I thought wow a lot of these concepts, frankly all of these concepts, could and should be used by LifePro advisors because coming up with compelling language should not be saved for just your lead-generating campaign, but instead every interaction you have with your clients.

First I want to get started by talking about the 4 U's. This concept was originally presented by an author named Mark Ford who has written more than two dozen books on business, entrepreneurship, and wealth building (several of which were New York Times and Wall Street Journal bestsellers), and half a dozen books on rhetoric - in other words, he specializes in writing and communicating.

The first of the 4 U's is Useful. This appeals to your client's self-interest and it is benefit-driven. Think of this as your client asking "What's in it for me". The next U is Urgent which gives your clients a reason to act now rather than waiting. Next is Unique. This is taking the time to say something new, or presenting the information in a fresh way. And finally, Ultra-Specific, which is the hook that will get your clients to stay engaged and to ask more questions. But why should you care about any of this unless you can apply it to your business right now?

A great example that utilizes the 4 U's is the concept of rate changes. Right now, at the time we are filming this video annuity rates are high, meaning it is a good time for your clients to lock in those rates. But how do you communicate that message to them? Let's walk through the 4 U's. First is useful. An annuity provides guaranteed income for life so you don't have to become a burden to your family. Urgent. The rates are high, but we believe that we are in an opportunity zone that could end at any time. Unique. You may be familiar with annuities, but did you know you can refinance it like you would your mortgage? And ultra-specific. My team and I can run a report to see if your current policy is on track and compare those results to the "refinanced" option available.

In just a couple of minutes, I was able to put together a sales pitch for an existing client that has annuities that could benefit from the current rate changes. Do you see any other areas of your business where using this type of language could help you reconnect with those existing clients?

So we covered the 4 U's, let's move on to three areas that again, you can use to encourage your clients to take action. First, we will touch on features vs benefits. You can think about a feature as a trait or attribute of your product or service that delivers value to your clients and differentiates you from your competitors. A benefit is how that product or service improves or adds value to your client's life, answering the question, "What's in it for me"? Features are great, but it's essential that you answer that all-important question for your clients. If you only list what you do and what you sell, your clients are not likely to move forward. So next time your clients ask, "So what do you do?" remember that what they are probably really asking is "What can you do for me"?

The next thing I wanted to cover is strategies to overcome common objections because again, you can utilize the 4 U's to make sure that messaging is as impactful as possible. So what do you do if your client asks "I don't know if this will work for me"? Social proof is key here. Showing that it has worked for others and highlighting testimonials and case studies.

What if your client says "I'm confused & overwhelmed"? Above anything else, this is when clear and concise communication is key. As advisors, we understand the ins and outs of the products we sell but can lose a client by getting too far in the weeds. If your client is confused it's important to step back and take that big-picture approach. And finally, what do you do if your client says "I don't need this"? This is when you need to create awareness and take a step back from explaining just those product's features, and focus on the benefits because again, we have to go back to what's in it for them.

Ok, let's move on now to 5 messaging tips that you can use when putting together your next marketing campaign, simply responding to an email, or planning for an upcoming appointment. The first one we've already touched on is to write in simple, clear, and concise sentences. We may be tempted to get into specifics about the products you offer, but it's important to focus again on the big picture - how is this product going to help your client's future? Next is to avoid negatives and aim your attention on the solution you are providing more than the problem itself. The 3rd tip is to avoid irrelevant wordplay because although building rapport with your clients is essential, some may find that humor is a pathway to that relationship, but using puns and gimmicks can distract from your messaging.

Next, we don't want to rely on AI tools to do all the work for you. Although it can be tempting to lean on Chat GPT to help you come up with the perfect thing to say, you should always make sure the messaging comes back to your client's voice and what resonates with them. And finally, you have to, have to, have to proofread everything that you write. Proper grammar and spelling help you establish credibility and trust with your clients. And please if you're using the same email copy to multiple clients, make sure that the address that email is going to is for the correct client. There's nothing like a client feeling devalued because you messed up and sent something to John that was supposed to go to Jason.

Now, all of these concepts are pretty straightforward, right? But keeping these things in mind any time you are communicating with your clients will help ensure that they are inspired to take action! Thank you again for your time today and we look forward to seeing you next week on Money Script Monday.