Episode #342 - Enhance Workshop Conversions with These Presentations

Hi there, and welcome back to another episode of Money Script Monday! My name is Jaime Ramirez, and I'm a marketing coordinator here at LifePro Simplicity San Diego. Every single day I get to work with an awesome group of marketers to help bring your marketing initiatives and efforts to life. Before we get started with the episode, I want to remind you to utilize the "share with a colleague" button you should see on your screen to share this video with those who you think would find it helpful.

Today, it's my honor to present the topic you see here on the screen behind me, "Enhance Workshop Conversions with These Signature Sales Presentations." These are proven presentations that work and have been converting prospects into clients for years, and for some of these presentations, decades.

One of the many reasons that I love working for LifePro is that we track everything. I'm able to reference data and events from years ago from before I was even working here. That means that you not only have the support of our current team, which is the best in the business, but the wisdom and insight bestowed on us over the last 40 years from the collective LifePro that has led us to this very moment, getting in front of you, to deliver proven sales presentations that are ready to implement with our event marketing platform today.

There's a newer advisor that we work with, and he was recently in the office, we were recording their indoctrination and thank you videos. He conducts social security workshops and that's something we can do in-house for you as well. But anyways, we were talking about our event marketing platform, and he was surprised at just how many presentations we have available to you – our advisors – to use, really depending on which ones are the best fit for your business and overall messaging. Whether the focus is IUL, annuities, AUM, or a little bit of it all, we have a presentation for you that will convert prospects into paid clients.

That's what I'll be talking about today. I'll be going over The Signature Presentations that LifePro has in place ready for you to use and get access to. We have six to choose from because we get that your clients financial needs are dynamic, and so is your business. We want you to have options when it comes to choosing the messaging that best resonates with the services you ultimately offer, and of course to leave room for growth in other areas of the industry as well.

Keep in mind that most of the concepts apply to both in-person workshops and webinars, but I am going to spend most of my time talking about in person workshops because that's where we're seeing a ton of success right now and what's really working for our advisors.

The first one is our holy grail – the mother of our signature presentations if you will - the one that this entire platform and system is built off of: How to Escape the Retirement Tax Trap. The topic for this presentation is federal income taxes in retirement, with the financial solutions being indexed universal life, and the target market of 45-64 year olds. The special offer that we promote at the end of the presentation is a personalized Wealth Report for the client.

You might be thinking "why is the report at the end of the presentation so important?" What we've learned over the years in doing this is that you need to have a strong call-to-action, something that will actually motivate prospects to raise their hand and move forward. The offer is the most powerful piece of the entire model. Something like "book an appointment" might not always be the most enticing so we work really hard to have that strong call to action so that clients feel confident, prepared, and ready to take that next step with you.

The second presentation that we have available to you is "How to Avoid the Retirement Income Crisis." This one you can think of the messaging as a more holistic approach to financial planning. A little bit of money here, a little over there, whatever the case may be. For that reason, the financial solutions offered here vary a little more to also include annuities and AUM in addition to IUL. Because we include things like social security and annuities, our target market here is a little bit older, 50-65+ year olds. The special offer at the end of this presentation, which you may already be familiar with, is the Retirement Income Shortfall Analysis. This essentially calculates a client's Retirement Success Score to see if they're on track or end up with an income shortfall.

The third presentation that we have to offer you is "How to Maximize Your Social Security Benefits." I'm most excited to share this one with you today, and it's the one I think you should pay the most attention to, because advisors are seeing a ton of success right now with this presentation. The financial solutions here are fixed index annuities, with the target market again being a little older, 50-65+ year olds. The offer at the end of this presentation is again the Retirement Income Shortfall Analysis.

Our next presentation is all about college planning, "How to Pay for College Without Going Broke." The financial solutions here include IUL and annuities, and the target market is a little younger, 34-64, because we are targeting parents and people who are starting to think about paying for college. The offer here is the most different than our other signature presentations, being The College Planning Service Center. This sales cycle tends to be a little bit different, with that initial offer being helping the students get into the college of their dreams before we discuss the financial solutions that will help get them there. If you want to learn more, reach out to our Director of College Planning, Gabe Lindemann. This program is his baby and he's worked hard to create a holistic approach for the client from start to finish.

I just went over 4 of our presentations, but I don't have nearly enough time to go over our last 2 presentations, which are about annuities and AUM. But if you want to learn about these, I recommend that you give your

Field Support Representative a call at 888-543-3776 and register for our upcoming Client Acquisition Webinar where we will be going over this entire event marketing funnel in much greater detail.

If you found any of this content valuable today, and you'd like to learn a little bit more, again I really encourage you to reach out to your Field Support Representative. Thank you so much for your time, and I'll see you on the next episode of Money Script Monday!