Becoming a Contact

The most difficult part of using the phone is the fact that people *just don't pick up.* Here's another interesting truth: If you are not in someone's phone as a contact, they don't acknowledge your call. Essentially, everyone's Do Not Call list is personal - i.e. if I know you, you're in my phone. If you're not in there, I don't pick up when you call.

I spend a lot of time in the first part of my seminars discussing the Digital-Vocal-Personal Mix. The Digital part is the most challenging. Many people prefer to text than talk but you CANNOT create an appointment by merely texting. The request for an appointment HAS TO BE IN REAL TIME. Technology creates critical lags in a "conversation" which work against you when scheduling an appointment. I'll never change my stance on this because this is a RELATIONSHIP DRIVEN BUSINESS. Use the technology to set a **Phone Date** (i.e. a time when you and the prospect can talk on the phone briefly).

How do you become a contact in another person's phone if you don't know them? Let's use referrals as an example.

I do not teach advisors how to GET referrals. Ask Bill Cates, The Referral Coach. What I DO teach is how to get that new person to talk to you on the phone. It requires a slight change in your conversation with the client who gives you the introduction.

Here's how I see the sequence of events:

At some point, you have to get your information into your client's phone. If you weren't already in their phone, then during the sales process make sure to correct this. I don't care WHEN you do this in the sales process, but your information can't be sent to a new introduction until your own client has you in their phone.

Once you have identified a potential referral, ask your client to text them a positive comment about you and attach your contact information to the text. Now, when you call the new introduction you come up as a name and number.

I had an advisor who told an entire class that he takes his client's phone and does the intro text himself. There were loud gasps to that idea. However, when I asked for more detail during the break, he shared that he offers to put himself into his client's phones during their appointments, thereby setting the precedent that he will "do the technology part" for them. His clients don't mind. And that allows him to control the texted message about him to potential referrals.

What can you suggest your client text to their friend? Here's an idea:

I gave your name to _______. He's taken care of our finances and he's very sharp. Please take his call.

You don't mention specifics about the work you did with your client, but you DO want positive comments about your skills.

Getting referrals is a critical part of building a financial services practice. Getting in touch with them by phone, so you can ask for an initial appointment, is just as important. In today's digital society, know how to leverage your relationship with your clients so that when you DO call a new person, they take your call.

Here's a great New Year's Resolution that you can actually keep: Check to see your own contact information in your phone. When you are sending it to others, does it have your full and proper name? Does it have your company name? Do you have your professional address? Both phone numbers (office and cell)? Are there any words misspelled? Do you have capital letters starting words that should have them?

Every time I tell people to check how they look in their own phone under Contacts, there is always a brief panic when the producers realize they haven't updated and "fixed" their own contact information. DO THAT NOW. And then you can say you kept your first - even if it's your only - New Year's Resolution.

Words Matter!

Gail

What you have to do and the way you have to do it is incredibly simple. Whether you are willing to do it is another matter. Peter Drucker