
2021 Scripts & Phrases

Adapting to todays technology & the Covid paradigm shift

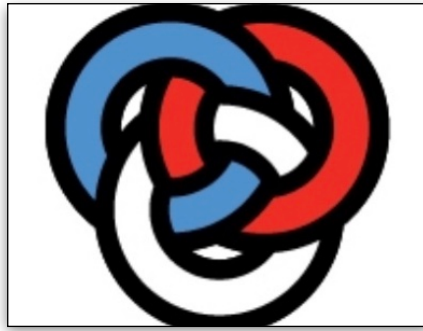
Shane Perry - January 5, 2021



Introduction

It's more important than ever that we change how we interact with prospective clients and associates. Our ability to elevate ourselves above mlm / network marketing companies, as well as all of the Primerica-copycat companies is critical.

The technology available today (Websites, social media, webinars, landing pages, email, etc.) gives us the ability to reach more people faster and more effective than ever. That, combined with the paradigm shift that's occurring due to the pandemic gives us an opening to grow our businesses faster than ever.



As we do this, It's vital that we control what we say and how we say it to the people we're talking to. Especially our new trainees, since they're the ones that are doing the most talking.

The following scripts are designed to take advantage of these times by allowing our associates to communicate what we have to offer in a credible, effective way.

Points:

- It's critical that we tell THEIR story. (Building a story brand - Donald Miller). The best, most effective way to do this is to begin your statement by: "I don't know about you, but most people today...". The words 'most people' are very powerful when used to make a point or convey a messages.
- Keep it casual. This makes people more comfortable, and allows you come across as more natural.

Pandemic message:

“How are you guys holding up? You doing ok? (Let them talk & tell their story)

I don't know about you, but most people are more scared and panicked about their finances than they are the virus.

One thing that this pandemic crisis has done is to cause people to realize that they have to take control of their money. Most have never had to really think about it because they've never had to. We know that for the last 20 years jobs have paid less and less, but most won't realize it until something bad happens, like the pandemic crisis.

People are now realizing that most everything they've learned about money, from what they do with it, to how they make it, doesn't work anymore. It hasn't for 20 years now.

They're scared, worried, angry, and they want answers. We represent the answers and the change they need so something like this will never happen again.”

Millennial & Gen Z recruiting message:

“I don't know about you, but I can tell you what most people our /your age are dealing with today: They're frustrated, lost, and overwhelmed over the lack of opportunity that exists.

Our generation (millennial's) is the most energetic, entrepreneurial, driven, intelligent generation that America has ever produced, but we're also a generation of firsts: We're the first generation that won't out-earn our parents, the first generation that will most likely work until we die, and we're living with our parents longer than any other generation that has come before us. Not because we want to, but because we simply can't afford to move out and create our own home for us and our families.

How can this be happening when we're the best generation ever? Because jobs don't pay what they used to, and there's no real opportunity for us. Some of us go to school because we're told that that's what we're supposed to do, but not even an education helps most of the time.

This company / opportunity is about empowering our generation with opportunity. Opportunity to get paid what we're worth, to show what we're capable of, and make a positive impact on our community.

Our office, environment, structure, and leadership is built to help people get to RVP within 12-18 months and earn well over \$100,000 per year after that. We're looking for people that are serious about changing their lives."

What do you do?

"I help people with their money.

You know how most people today, when it comes to their finances, they're confused, scared, worried, etc? Most people have an idea of where they'd like to go, but have no idea of where to start, who to talk to, or how to get there.

Our company has a digital tool, it's like a GPS for your money, a financial GPS. This gives people an idea of where they are, and exactly where they need to be, and how to get there. It allows our clients to worry less about money and enjoy life more.?

Offer to call them, or get their email and offer to send them some information.

Explaining what you do (good for young people talking to their family)

"Training to become a Personal Financial Analyst."

60-90 day pre-licensing training program, where I'll learn the products and client relations, etc.

I help people with their money. Teach them about financial planning: budgeting, debt-elimination, college funds, retirement investing, insurance, etc.

You know how most people, when it comes to their finances...

It's like Real Estate, only with financial planning products:

I'll be working out of an office, it's 2,200 square feet in the Haslan Building. My broker, Shane Perry, has been with the company for 30 years, has multiple offices in the Fresno area, and is now doing the same here on the coast."

If it's a free service, how do you get paid?

Amazon example:

"You know how when you use Amazon to buy something, it doesn't cost you anything to use the Amazon platform? Well that's because if you're a seller, and you want to sell your products on Amazon, then you pay Amazon a small percentage based on the price of the item. That's how Amazon makes their money.

We're the same way. When we connect a client to one of the many financial companies that we represent, it doesn't cost them anything to purchase the product. The financial company then pays us based on the product and how much the client invested."

'Professional License'

Start a conversation about the time we're in (Covid)

"How are you guys holding up? You ok?" Let them talk.

"I don't know about you, but most people... (pandemic conversation)

"So, what are your plans?" Let them talk, then continue below.

"Have you ever thought about getting a professional license?" (they will respond. Usually with something like 'no, what do you mean?').

"Well you know how Real Estate has always been a great go-to for people that wanted extra income or a career change? It's because anyone can get a Real Estate license. Once they connect with a broker, most of them work as independent contractors. This means they are their own boss, no set hours, minimums, or quotas to hit. When they do decide to get out and sell a property, they make good income for the time they spend. It's way better than a typical part-time job.

We operate the same way, only within the investment/insurance industry. The next 15-20 years will be the most lucrative period in the most lucrative industry, and our company allows people to get an investment license as an independent contractor, just like real estate."

"For most people, it makes sense to at least take the next 90 days to learn a new business, learn new skills, get a professional license, and arm themselves with the ability, at the very minimum, to build a second income stream, or even a career move this year."

Try to set a time to meet with them. Either one on one or over Zoom. If they're hesitant, then offer to send them the video, or send them the link to the landing page.