



NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

PROGRAMS IN A BOX: ACHIEVING SUCCESS FOR NAIFA ASSOCIATIONS

THE PROBLEM WITH PENGUINS: HOW TO DRAMATICALLY INCREASE THE REVENUES OF YOUR FINANCIAL SERVICES BUSINESS BY BRANDING & PACKAGING YOUR BIG IDEA

BILL BISHOP

Presentation Outline

1. The Penguin Problem: Why most financial advisors don't stand out in a crowded marketplace (10 min.)
 - a. Why having 28,700,000 competitors makes it hard to stand out
 - b. Reasons why your prospects and clients might think you are the same as everyone else
 - c. The Sales Pitch Bunker: Why you won't meet very many great prospects if they think you are a salesperson
2. The Packaging Strategies (40 min) (about 7-8 min. each)
 - a. How to stand out from the competition: Develop a BIG Idea: something new, better, and different
 - b. How to get the attention of more prospects: Develop a theme or hook for your story
 - c. How to get more prospects to knock on your door: Do the three-step packaged marketing technique:
 1. Use a high-value marketing tool
 2. Offer a fabulous first date.
 3. Close faster by offering three packages.
 - d. How to make more money per client: Package and offer an advanced gourmet service in addition to the basic financial products
 - e. How can we be seen as a trusted advisor, not a salesperson?: Package yourself as a coach.
 - f. How can we multiply our business?: Package your step-by-step process.
 - g. How to develop your BIG Idea: Build your new factory while running your old factory.
3. The Packaged Advisor: Results. (5 min.)
4. The Problem With Penguins Test: How to assess your current situation and get started creating your Big Idea. (5 min.)