MoneyMakers

Sales ideas for the next level of success.

"How Do I Learn My Customer's Wants?"

There are two ways of gathering information about your customer

1 ASKING QUESTIONS

Conversational

- Do you live nearby?
- Have you worked in this area long?
- What do you do?
- Do you have children (or grandchildren?)

Interview

- What is your address?
- What is your occupation?
- What is your child's name?
- How would you describe your investment experience?

2 CONFIDENTIAL FINANCIAL REVIEW

Using a Confidential Financial Review ensures you obtain a complete financial history of your customer, but it may make your customer uncomfortable. One way to make filling out the CFR easier for your customer is to fill it out together. Sit on the same side of the desk as your customer, then clarify or rephrase the questions so your customer feels like you are working with him to achieve his financial goals.

If you want to be sure you don't miss any important pieces of information about your customer, use a Confidential Financial Review to guide your discussion.

When you feel comfortable asking the questions and confident you won't forget to ask any of the important questions, you can use the Conversational Approach with just a yellow pad of paper to keep notes about your discussion.

Essex Corporation

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