



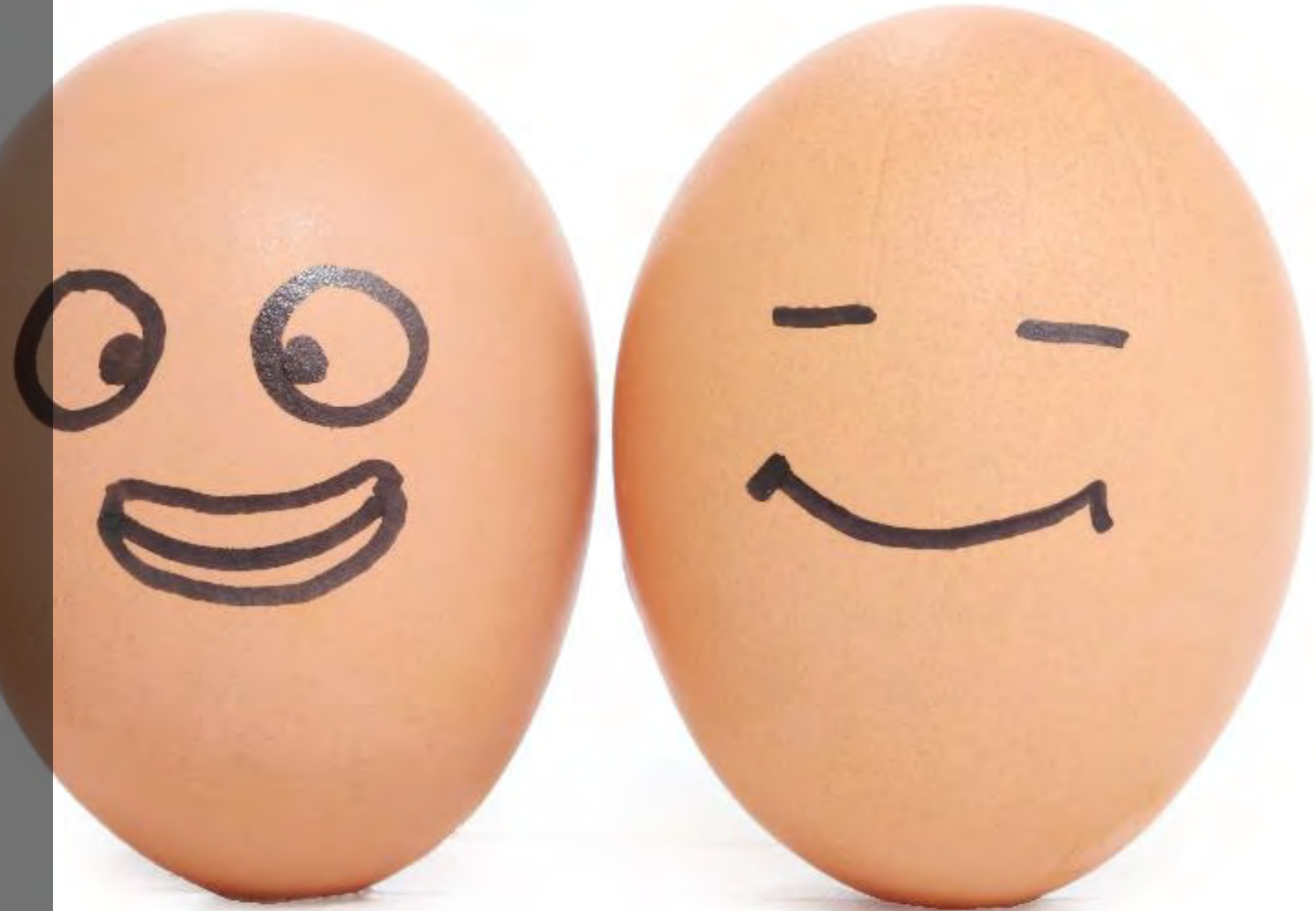
We learned to Survive and
Thrive by letting in a little
Sunshine ... and some
Chuck and Walt!

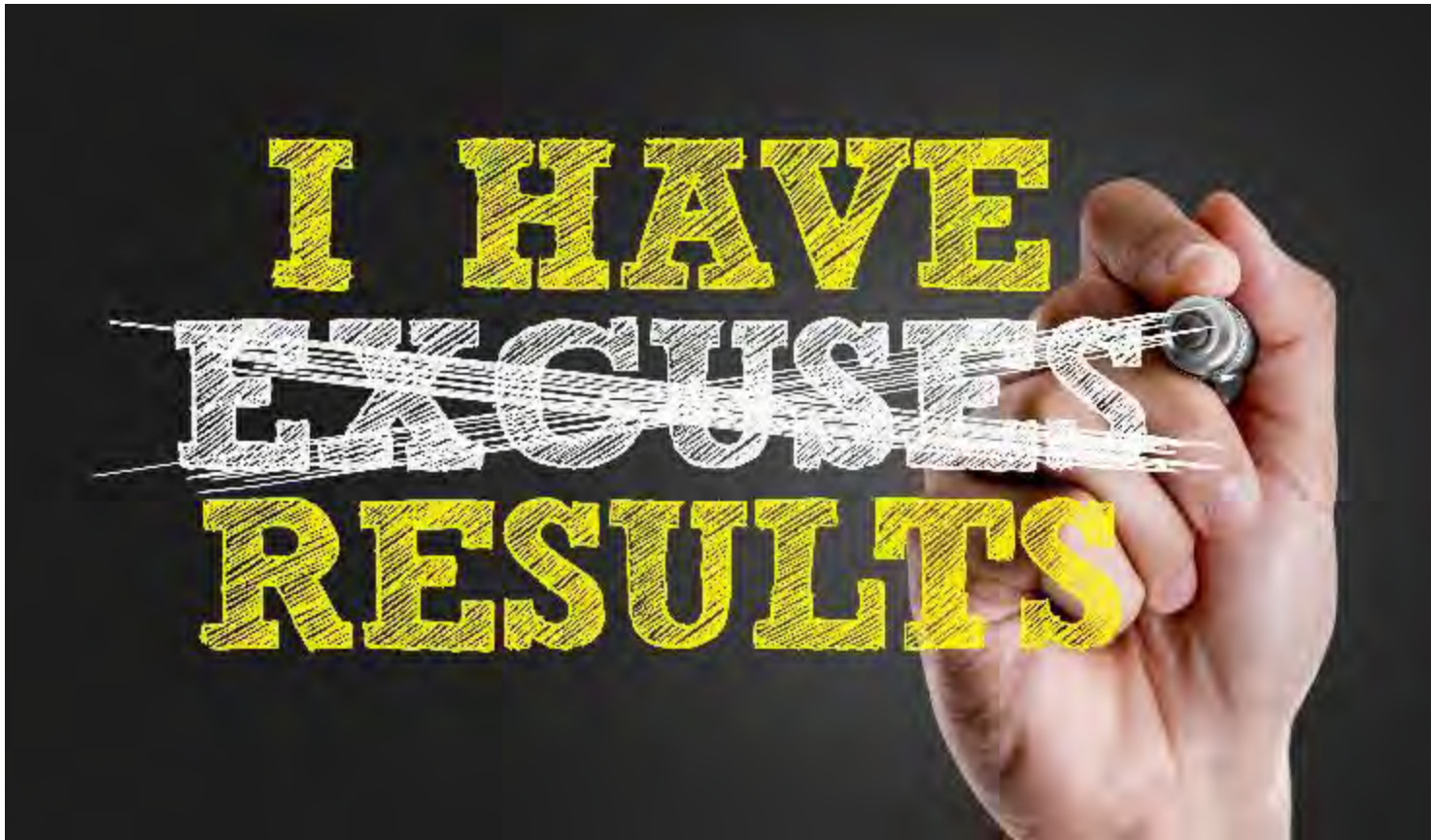




They were good
“eggs” to share their
stories

and haven’t cracked
under the pressure ...
so what did we find
out??





They didn't let the families
"scramble" their bottom line!

- Sunshine": "What excuse can they really have right now? I am able to accommodate the appointment in so many ways."
- Chuck: "I have to adapt in order to get the appointment. Whatever works for the family."
- Walt: "I give the person lots of options to meet right from the start so they know I can accommodate whatever they want."

They shared some great ingredients for success!

- Keep it fresh!
- Don't over think the process!
- Keep up the activity! Having something in your pipeline that you know is going to process is like waiting on the Easter Bunny!
- Have the right mindset! See yourself getting that appointment. Remember, a lot of families are not aware of how the funding works and when they find out, they get excited!
- Have a game plan!
- Do what you need to get it done! And do it all (text, emails, calls, snail mail, drop off, in person) whatever it takes!
- Re-dial a second time before leaving a VM and see if you get more pick ups on that 2nd call.



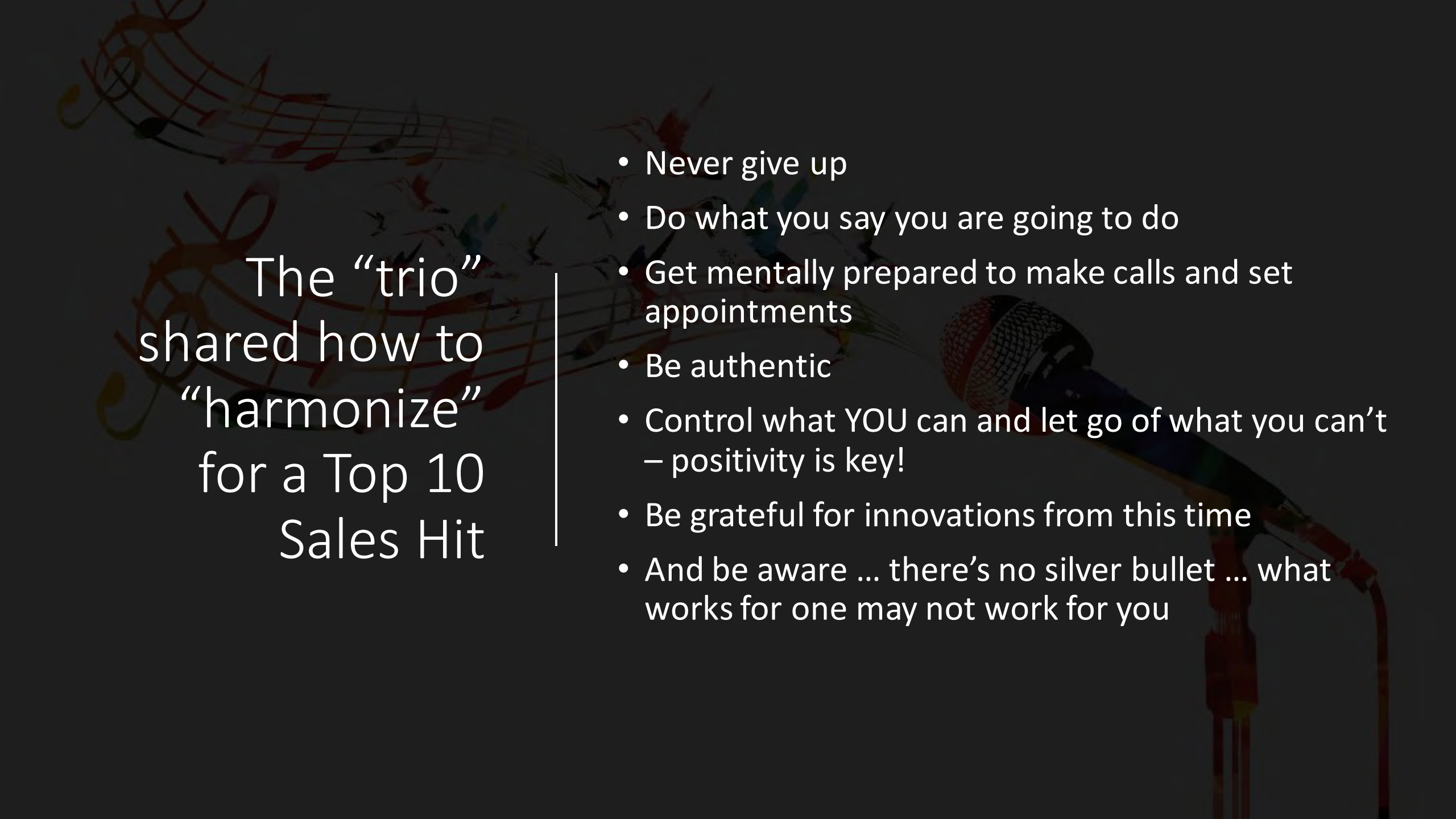


And the ensemble of Whitney, Stephanie and Jake shared their “notes” for harmonious sales!

Orchestrate success

- Whitney warms up her vocals by switching up her calling times to early morning and after dinner, leading with emails of “I am here for you.”, and being lyrical by leaving voice mails every time.
- Stephanie flexes her fingers by having her own “Call Night” one evening each week from 6:00 – 7:30 PM (Friday) or 9:00 – 11:00 AM (Saturday).
- Jake backs up the ladies with the number of calls based on his appointment schedule for each day, taking detailed NOTES for every interaction with families, scheduling daily tasks to ensure follow up is on time and ALWAYS leaves voicemail message!

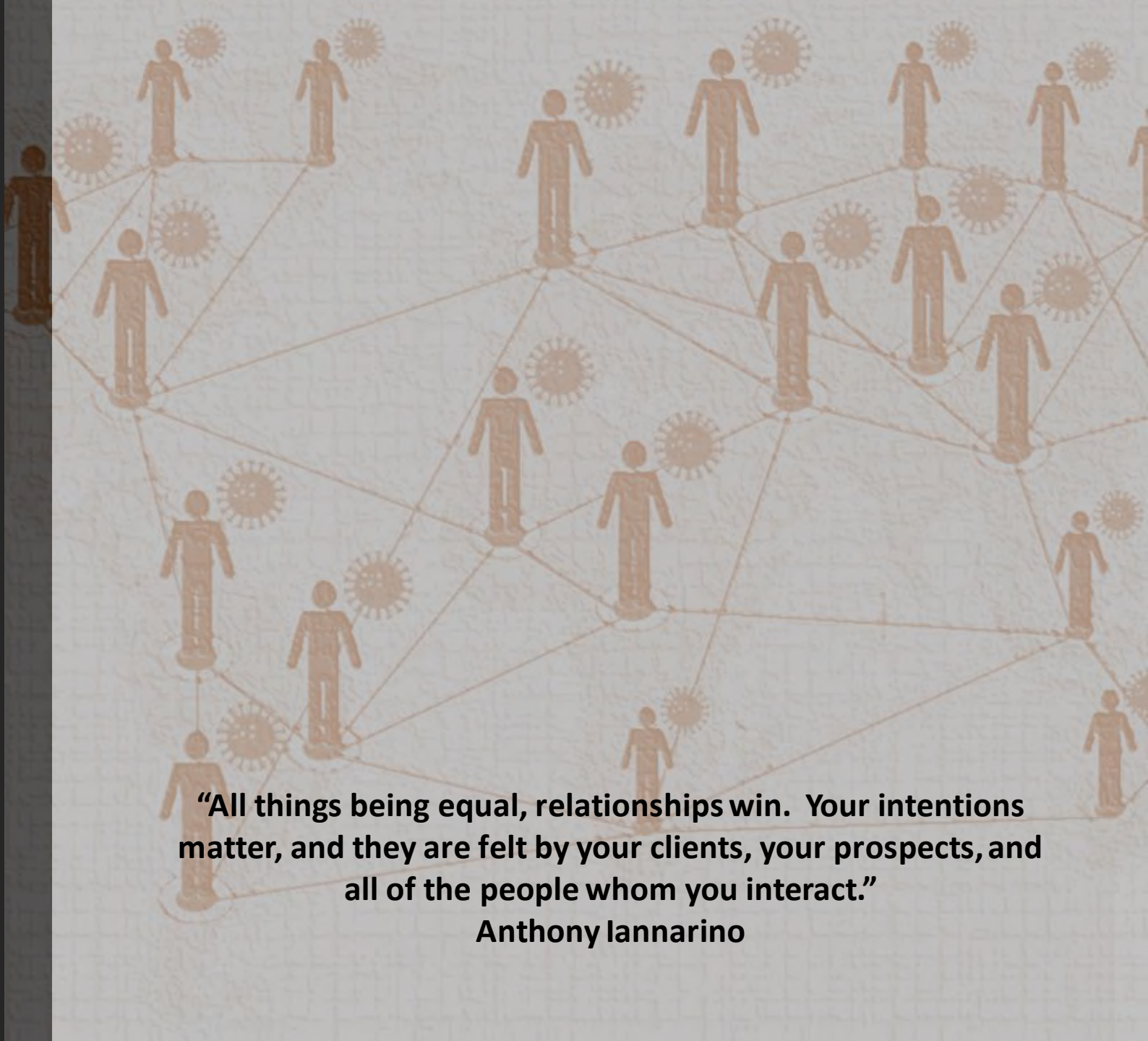


The background of the slide is dark with a subtle pattern of musical notes and a microphone. The notes are in various colors like red, blue, and yellow, and the microphone is a vintage-style silver one with a red band. The text is white and positioned on the left side of the slide.

The “trio” shared how to “harmonize” for a Top 10 Sales Hit

- Never give up
- Do what you say you are going to do
- Get mentally prepared to make calls and set appointments
- Be authentic
- Control what YOU can and let go of what you can't – positivity is key!
- Be grateful for innovations from this time
- And be aware ... there's no silver bullet ... what works for one may not work for you

Cooking or
music ... it's
all about
connecting
with people

A network diagram on a light beige background. It features numerous stylized human figures in a reddish-brown color, each with a circular halo around its head. These figures are interconnected by thin, light-colored lines, forming a complex web. Interspersed among the human figures are several virus-like icons, also in a reddish-brown color, which have a central dot and radiating lines, resembling coronaviruses. The overall composition suggests a theme of interconnectedness and the spread of ideas or information, possibly in the context of the COVID-19 pandemic.

“All things being equal, relationships win. Your intentions matter, and they are felt by your clients, your prospects, and all of the people whom you interact.”

Anthony Iannarino



Your social assistant ... your CRM!

- A CRM is like your own mini social network filled with details about the people most important to your business. Think of it as your personal assistant!
- It will help you:
 - Keep your pipeline full of leads
 - Follow up in a timely and systematic manner
 - Prioritize sales activities
 - Prevent leads from “falling through the cracks”
 - Achieve sales (and income!) goals more easily and effectively



Knowledge is Power

- Knowing who you're targeting is critical to your success.
- Utilize the notes section for personal information.
- Keep detailed activities so you have the last conversation at your fingertips when you get a call.

But ... all this will only work if your “head” is in the right place ...



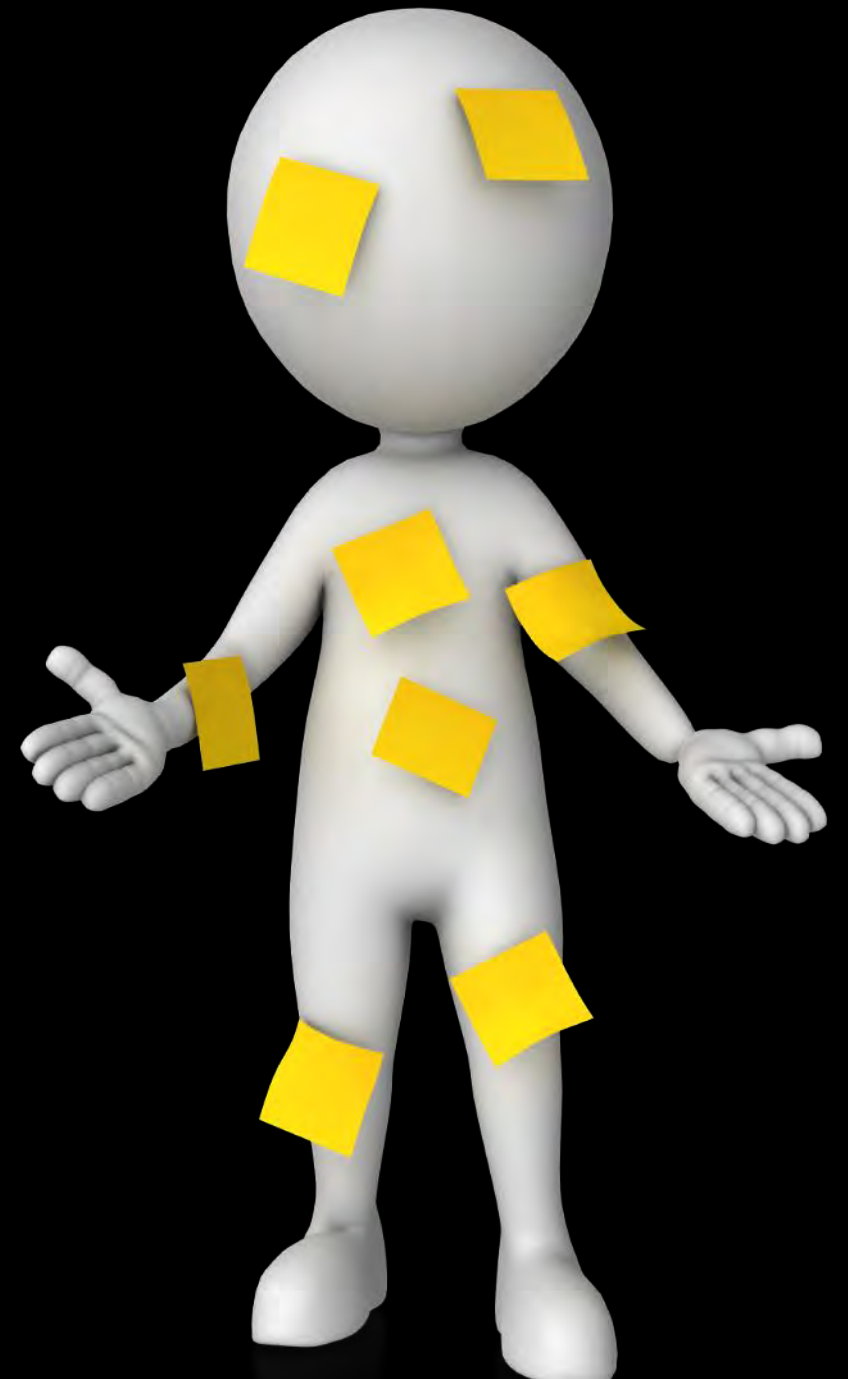
Just the facts, m'am...

- **The way we meet, interact and share information has changed...**
- Customers have become more comfortable with virtual platforms for new options to "visit."
- Convenience, simplicity and communication preference.
- Why not NOW? We are experiencing uncertainty right now so why not take care of one of those certainties in life.
- ***Education is always valuable. Kindness and caring are priceless.***



Making the change stick!

- **Mindset is powerful:** Stay connected with your purpose
- Understand your priorities to focus only on what is important
- *Listen to hear what others are contributing to gain new insights*
- *Adopt and integrate your learnings to progress*
- Choose what you want to let go of and accept the loss that comes with that choice and move on
- Take courageous decisions and be prepared to move forward step-by-step



What's next???

What new doors would you like
opened for you?

Send DJ and Michelle your ideas
for our new Fall season!

