



2016 MDRT Annual Meeting e-Handout Material

Title: 7 Strategies to Help You Reach MDRT's Top of the Table

Speaker: George D. Goulet, TEP, CFSB

Presentation Date: Tuesday, June 14, 2016

Presentation Time: 3:30 - 5:00 p.m.

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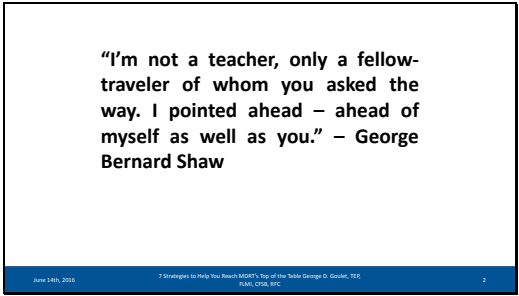
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Slide 1



Slide 2



Slide 3



Slide 4

How are we going to do this?

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Slide 5

1. Increase the number of sales we make.
2. Increase the size of sales we make.
3. Some combination of these two.

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Business Activities and Tactics

- Ask for referrals.
- Increase the number of new client development meetings.
- Focus on sales activities and delegate non-sale activities.

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We all already know exactly what business activities and tactics we would need to consistently do to reach the Top of the Table production level.

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7

Slide 8

You already have the “know how.”

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8

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Recap

1. We all want to reach the Top of the Table sales production level or our next level of success.

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9

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Recap

2. We know that in order to do this we will have to either:

- Increase the number of sales we make.
- Increase the size of sales we make.
- Some combination of the two.

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10

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Recap

3. We all already have the “know how”.

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11

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Consistency

Is there anyone in the room who thinks it would not be possible to improve their consistency in performing these business activities and tactics?

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12

Slide 13

Consistency

If you could improve your consistency in performing these business activities and tactics, would it be logical to expect and would it be reasonable for you to expect to increase your sales production level?

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13

Slide 14

Consistency

So why are we not able to be optimally consistent in performing the business activities and tactics that we already all know would bring us a higher level of success? What is stopping us?

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14

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Barriers to Reaching Our Next Level of Success

What are the specific barriers that are stopping you from being optimally consistent in performing the business activities and tactics that would bring you to your next level of success?

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15

Slide 16

Examples of Barriers

- “I don’t have enough time because of high client service demands.”
- “I don’t have enough good prospects.”
- “I always have to deal with heavy competition.”
- “I have overwhelming family demands.”
- “I just don’t enough energy.”
- “Etc.”

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Barriers Exercise

What are your top 3 barriers that are roadblocks to realizing the level of success you aspire to?

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17

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Accountability

What is it about your top 3 barriers that relates to you?

“All progress starts with telling the truth.”
– Dan Sullivan (Strategic Coach)

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18

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The MDRT Magic Wand

If all of your barriers were to go away, is there any other reason that would prevent you from reaching MDRT's Top of the Table production level?

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19

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The MDRT Magic Wand

Would you or would you not immediately do whatever it takes to address and deal with your barriers in order to save the life of your loved one?

You would do whatever it takes, wouldn't you?

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20

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What happened? What changed?

How did you instantly go to resolving that you would absolutely do whatever is necessary to address and deal with the barriers facing you?

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21

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Internal Motivation

Motivation – “The reason or reasons one has for acting or behaving in a particular way. The general desire or willingness of someone to do something.”

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22

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Internal Motivation

We must first have sufficient internal motivation or a good enough reason in order for any of us to move from our current level of success to our next level of success.

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23

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The purpose of the “Save the Life of a Loved One” scenario.

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24

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Sufficient Internal Motivation

When we have sufficient internal motivation, or a good enough reason, this naturally results in action.

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25

Slide 26

Insufficient Internal Motivation

When we have insufficient internal motivation, or do not have a good enough reason, this naturally results in action not being taken.

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26

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If we currently do not have the level of success we aspire to it is because we do not have sufficient internal motivation, or a good enough reason, to do so and as such we are not taking the actions that are necessary to move from our current level of success to our next level of success.

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27

Slide 28

What causes us to become internally motivated?



Laura



Susan

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28

Slide 29

What causes us to become internally motivated?



Laura

Wanted to lose 40+ Lbs.


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29

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What causes us to become internally motivated?



Susan

Wanted to quite smoking.

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30

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What causes us to become internally motivated?




Laura

Was motivated and as a result took action and succeeded.

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What causes us to become internally motivated?



Susan

Was not motivated and as a result did not take action and did not succeed.

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Slide 33

Why?

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Slide 34

The Bottom Line

- When we make a decision to hold ourselves to a higher standard of what we believe we are capable of or deserve, we create for ourselves a reason, or the motivation, to take action.
- A decision to hold ourselves to a higher standard arises out of wanting more or better for ourselves when we are no longer willing to settle for where we are at right now.

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34

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The 7 Strategies

- The 7 Strategies are about ways in which we can go about holding ourselves to a higher standard.
- Ultimately, it is up to you to determine what your higher standard is based on what is right and true for you.

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35

Slide 36

1st Strategy

Set Bigger Lifetime Goals

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36

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If you have a big enough why you will figure out the how.

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Lifetime Goals

- Goals for your entire life.
- These are big, inspiring goals that will guide you to live your fullest, richest life experience – to hold yourself to the highest standard you aspire to for your life.

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Slide 39

Set Bigger Lifetime Goals

Example 1

Traditional Goal:
Travel to Spain within the next 3 years.

Lifetime Goal:
Travel to 50 countries during my lifetime.

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Slide 40

Breakdown

- 3 year: 7 Countries.
- 1 year: Caribbean Cruise (3 Countries).
- 3 month: Research and plan cruise.
- 1 week: Discuss with Spouse and Decide on Geographical area.

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40

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Set Bigger Lifetime Goals
Example 2

Traditional Goal:
Lose 10 pounds.

Lifetime Goal:
Daily 1 mile walk with a friend or family member at age 100.

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41

Slide 42

Breakdown

- 3 year: B/P 110/70 RHR 56. ABC 200 Km Charity Ride.
- 1 year: B/P 120/80 RHR 64. Lifecycle machine L12 for 20 minutes/30 minutes resistance training 6 days a week.
- 3 month: Lose 14 pounds. Exercise 30 minutes 4 days a week. Eliminate processed foods from diet.
- 1 week: Join a fitness club and book training with a personal trainer.

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42

Slide 43

Lifetime Goal Exercise

- Open your Smartphone calendar.
- Go to June 14th, 2017.
- Schedule a new Appointment at 9:00 am for 30 minutes to “Review my 2016 MDRT Meeting Lifetime Goal.”
- In notes write you Lifetime Goal with your 3 year and 1 year breakdown.
- Do the same at September 14th, 2016 with your 3 month breakdown.

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43

Slide 44

Lifetime Goals Summary

- When we set meaningful and inspirational lifetime goals, the process of doing this taps into our capacity to believe in and hold ourselves to a higher standard of what we are capable of.
- Lifetime goals give us a reason, or the motivation, to pursue our richest, fullest life experience. They bring passion, excitement, enthusiasm, confidence and energy into our daily experience.

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44

Slide 45

Lifetime Goals Summary

- Your clients don't purchase your products they purchase you.
- When you arrive in the arena of business with passion, excitement, enthusiasm, confidence and energy your clients will pick up on these attributes and be drawn to you which supports you in experiencing a higher level of success.

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45

Slide 46

2nd Strategy

Use Natural Methods to Alter Your Bio-Chemistry in Order to Increase Your Level of Passion, Excitement, Enthusiasm, Confidence and Energy

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46

Slide 47

Physical Exercise

"When you exercise, your body releases endorphins which are chemicals that interact with receptors in your brain that reduce your perception of pain and trigger a positive feeling in the body similar to that of morphine".

Source: webmd.com

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47

Slide 48

Physiological Benefits of Exercise

- Strengthens your heart.
- Reduces blood pressure.
- Normalizes blood sugar levels (reduces risk of diabetes).
- Improves balance of good and bad cholesterol.
- Strengthens bones (increases bone density).
- Reduces body fat and improves weight control.
- Reduces risk of many critical illnesses such as cancer.

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48

Slide 49

Psychological Benefits of Exercise

- Increases confidence and self esteem.
- Fights feelings of fatigue and increases energetic feelings.
- Increases cognitive brain functioning.
- Reduces stress.
- Improves sleep.

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49

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Meditation or Mindfulness

- Builds resilience and decreases anxiety which boosts performance under stress.
- Boosts emotional intelligence (strengthens your ability to regulate your emotions).
- Enhances creativity and divergent thinking which supports us in coming up with insights and breakthroughs.
- Helps us to focus.

Source: Harvard Business Review (hbr.org)

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50

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Business Leaders who have Practiced Meditation-Mindfulness

- Marc Benioff – CEO, Salesforce
- Arianna Huffington – President, Huffington Post Media Group
- Ray Dalio – CEO, Bridgewater Associates
- Rick Goings – CEO, Tupperware
- Jeff Weiner – CEO, Linked In
- Steve Jobs – CEO, Apple

Sources: businessinsider.com and forbes.com

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51

Slide 52

Natural Methods Summary

- When we use natural methods to alter our bio-chemistry we increase our level of passion, excitement, enthusiasm, confidence and energy.
- This is not only extremely beneficial for our health but it further supports us in our reasons or motivation to live our richest, fullest life experience.

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52

Slide 53

Natural Methods Summary

- Again, your clients don't purchase your products they purchase you.
- When you arrive in the arena of business with passion, excitement, enthusiasm, confidence and energy your clients will pick up on these attributes and be drawn to you which supports you in experiencing a higher level of success.

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53

Slide 54

3rd Strategy

Master How You Allocate Your Time

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54

Slide 55

3 Approaches to Mastering How You Allocate Your Time

1. Recognize and Place a Higher Value on Your Time.
2. Develop The Skill of Saying Yes to What Matters Most and Saying No to What Does Not Matter Most.
3. Identify and Execute Your Highest Priority Revenue Generating Activities Daily.

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55

Slide 56

1. Recognize and Place a Higher Value on Your Time

What is the value of your production time?

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56

Slide 57

1. Recognize and Place a Higher Value on Your Time

- Our Year is 365 days.
- How many days do we actually have each year to reach our production target?
- 365 days
 - 104 days for weekends (52 x 2).
 - 12 days for statutory holidays and select Friday's
 - 25 days for family and seasonal holidays.
 - 14 days for MDRT/TOT, professional development and coaching.

= 210 days

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57

Slide 58

1. Recognize and Place a Higher Value on Your Time

- 210 Days
 - 126 Preparation Days (client service, file preparation, business management, team meetings/retreats, etc.)
 - 84 Production Days (based on an estimate of 1.5 Preparation Days for each Production Day).
- How many production days do you have?

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58

Slide 59

1. Recognize and Place a Higher Value on Your Time

- If you divide your 2015 annual income by your number of production days you arrive at the value of each production day.
- If you divide the value of a production day by your average number of hours worked on a production day this gives you the hourly value of your production time.

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59

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Value of Time Exercise

- Start with 365 days.
 - ___ days for weekends (52 x 2).
 - ___ days for statutory holidays and select Friday's.
 - ___ days for family and seasonal holidays.
 - ___ days for MDRT/TOT, professional development and coaching.
- = ___ days
- ___ Preparation Days (client service, file preparation, business management, team meetings/retreats, etc.).
- ___ Production Days.

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60

Slide 61

Value of Time Exercise

\$ ____ 2015 income.
/ ____ Production Days.
= ____ Value of a Production Day.
/ ____ Average number of hours worked on a production day.
= ____ hourly value of your production time.

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61

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1. Recognize and Place a Higher Value on Your Time

- The value of your production time is significant. If you increase the amount of your production time logically you should increase your production level.
- In order to increase your production time it is critical that you delegate or source out as many business activities as possible that have an economic value less than the hourly value of your production time.

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62

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2. Develop The Skill of Saying Yes to What Matters Most and Saying No to What Does Not Matter Most.

You have to know when and what to say no to so you can say yes to increasing your production time.

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63

Slide 64

2. Develop The Skill of Saying Yes to What Matters Most and Saying No to What Does Not Matter Most.

- Surveys.
- Vendors.
- Company representatives.
- Meaningless networking events.
- Unnecessary office meetings.
- Unnecessary emails, phone calls, correspondence, magazines etc.
- Office socializing (Social "Bill").

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64

Slide 65

2. Develop The Skill of Saying Yes to What Matters Most and Saying No to What Does Not Matter Most.

"The difference between successful people and really successful people is that really successful people say no to almost everything"

– **Warren Buffet**



Source: lifehack.org

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65

Slide 66

2. Develop The Skill of Saying Yes to What Matters Most and Saying No to What Does Not Matter Most.

"People think focus means saying yes to the thing you've got to focus on. But that's not what it means at all. It means saying no to the hundred other good ideas that there are. You have to pick carefully. I'm actually as proud of the things we haven't done as the things I have done. Innovation is saying no to 1,000 things."

– **Steve Jobs**



Source: lifehack.org

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66

Slide 67

3. Identify and Execute Your Highest Priority Revenue Generating Activities Daily.

- Every day identify and make the **3** most critical revenue generating **“new client” “calls”** or **“texts”** that will initiate new business development.
- If possible make them first thing in the morning.

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67

Slide 68

3. Identify and Execute Your Highest Priority Revenue Generating Activities Daily.

- Every day identify and send the **2** most critical revenue generating **“emails”** to move new business development forward with **“new clients”**.
- If possible send them first thing in the morning.

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68

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Master How You Allocate Your Time Summary

- To increase our production we must consistently make good decisions about how we allocate our time so that we are able to maximize the amount of time that we have available for revenue generating production activities.
- As you increasingly recognize the value of your time you will naturally allocate more of your time towards revenue generating production activities.
- Mastering how you allocate your time is a never ending journey.


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69

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“Did they wait until it was too late to make from their lives even one iota of what they were capable?...if you listen real close, you can hear them whisper their legacy to you. Carpe-Diem. Seize the day...Make your lives extraordinary.”



- John Keating
(played by Robin Williams)
Dead Poets Society

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70

Slide 71

4th Strategy

Identify and Conquer Your Barriers

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71

Slide 72

Identify and Conquer Your Barriers

- In order to reach our next level of success we must deal with or overcome our **“barriers”** that are limiting us from moving forward.
- In order to do this we must transform our **“barriers”** from **“road blocks”** to **“stepping stones”**.
- How do we do this?

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72

Slide 73

Identify and Conquer Your Barriers

4 Steps

1. Identify your barrier (eg. "I am overwhelmed with the time demands of dealing with client service issues which limits my time to develop new Business").
2. Identify what you bring to this barrier or your part in this barrier existing (eg. "I haven't figured out how to deal with the significant demand on my time to address client service issues so that I can have more time to develop new business").

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Slide 74

Identify and Conquer Your Barriers

4 Steps

3. Reframe your barrier into a "challenge to be solved" (eg. "I need to figure out how to deal with the significant demand on my time to address client service issues so that I can have more time to develop new business").
4. Identify all of the "obstacles" to your "challenge to be solved" and your "strategies" for dealing with your "obstacles".

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Slide 75

Identify and Conquer Your Barriers

4 Steps

Challenge to be solved: "I need to figure out how to deal with the significant demand on my time to address client service issues so that I can have more time to develop new business".

Obstacles: 1. Clients see me as the only contact, 2. My assistant(s) are inexperienced, 3. Client statements are confusing, 4. etc.

Strategies: 1. Communicate with clients to contact my assistant(s) first, 2. Assistant(s) to arrange training with carriers, 3. Assistant(s) to email a summary prior to statements arriving indicating to call them if any questions, 4. etc.

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Slide 76

Identify and Conquer Your Barriers Exercise

1. Go back to the 3 **"barriers"** you identified earlier (eg. "I am overwhelmed with the time demands of dealing with client service issues which limits my time to develop new Business").
2. Identify what you bring to each of these 3 **"barriers"** or your part in that barrier existing (eg. "I haven't figured out how to deal with the significant demand on my time to address client service issues so that I can have more time to develop new business").

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76

Slide 77

Identify and Conquer Your Barriers Exercise

3. Reframe each of your 3 **"barriers"** into a **"challenges to be solved"** (eg. "I need to figure out how to deal with the significant demand on my time to address client service issues so that I can have more time to develop new business").

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77

**We do not have the time available to do this at this point but when you have the opportunity write out the "obstacles" facing you for each of your 3 "challenges to be solved" and your "strategies" for dealing with those "obstacles".*

Slide 78

Identify and Conquer Your Barriers Summary

- Barriers are a natural and normal part of life and business. Whatever your barriers are once you have dealt with them new barriers will arise.
- When we are able to reframe our **"barriers"** into **"challenges to be solved"**, identify our **"obstacles"** and **"strategies"** to deal with those **"obstacles"**, we are taking direct meaningful action to transform the **"road blocks"** that are blocking us from reaching our next level of success into **"stepping stones"** towards reaching our next level of success.

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78

Slide 79

5th Strategy

SPECIALIZE



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79

Slide 80

If You Required a Cardiovascular Surgeon and Had a Choice Which Doctor Would You Choose?



Dr. Dewital, specialist in:

- Brain Surgery
- Cardiovascular Surgery
- Cancer Treatments
- Plastic Surgery
- Disk Surgery

- Laser Eye Surgery
- Chiropractic Treatments
- Don't forget to ask about our line of vitamins and orthotics.

Dr. Focus:

- Cardiovascular Surgeon exclusively for Executives and Professionals.


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80

Slide 81

ABC Benefits



John Everything

— Financial Advisor.
Specialist in financial planning, tax planning, retirement planning, business planning, investments, life insurance, disability insurance, critical illness insurance, educational savings, employee benefits and mortgages. Serving anyone and everyone.

ACCEPTING ANY AND ALL NEW CLIENTS NOW!

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81

Slide 82

4 Ways to Specialize

1. Product offering
2. Market Segmentation
3. Demographics (age and gender)
4. Social Style

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FLM, CFA, RFP

82

Slide 83

4 Ways to Specialize

1. Specialize in only one or two product offerings.

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FLM, CFA, RFP

83

Slide 84

4 Ways to Specialize

2. Specialize in only one market segment.

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FLM, CFA, RFP

84

Slide 85

4 Ways to Specialize

3. Specialize with only one demographic group.

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FLMI, CPIM, RFP

85

Slide 86

4 Ways to Specialize

4. Specialize in only one social style.

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FLMI, CPIM, RFP

86

Slide 87

What type of social style do you work best with?
What type of social style do you most associate with?

The Social Styles Model

ASK Directed

TELL Indirected

PEOPLE Directed

Expressive

Analytical

Driver

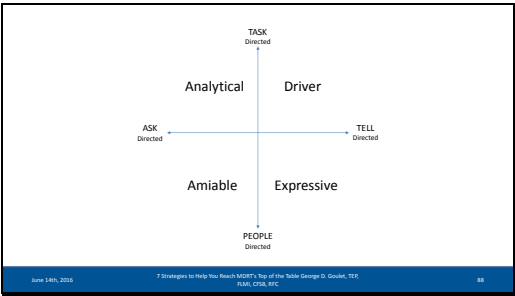
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87

Slide 88



Slide 89

Specialization Exercise

When you return to your office you find out that while at MDRT new regulations have been introduced that require you to:

1. Offer a maximum of two products.
2. Provide your services to only one market segment.
3. Provide your services to only one demographic age group.
4. Provide your services to individuals only within one type social style.

Under the new regulations once you elect these categories you will not be able to change them. What would you choose?

At the bottom of the slide, there is a footer: "June 14th, 2015 7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, TED, FARM, CPFS, RBC 89".

Slide 90

Specialization Summary

- When you specialize you will develop a better understanding of the issues and challenges that your clients and prospective clients face and as a result you will be better at relating to them and establishing credibility more quickly.
- When you specialize you will become the best of the best in your field which will support you in creating a niche business monopoly in your market.
- Specialization is the most efficient approach to increasing your production level in order to reach your next level of success. It is simply an undisputable statistical fact that the vast majority of the highest producing advisors are specialists.

At the bottom of the slide, there is a footer: "June 14th, 2015 7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, TED, FARM, CPFS, RBC 90".

Slide 91

6th Strategy

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

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FLM, CFS, REC

91

Slide 92

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

- We use a direct marketing system to cultivate **"Ideal Clients"** that in my office we refer to as our **"Million Dollar Direct Marketing System"**.
- We have one individual in our office who is responsible to manage and administer all aspects of our direct marketing system.

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FLM, CFS, REC

92

Slide 93

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

5 Steps

1. Use your LinkedIn to build a **"LinkedIn Prospect Bank"** of **"Ideal Prospects"**.
2. Create a separate **"Target Prospect List"** of **"Ideal Prospects"**.
3. Create a **"Compelling Offer Brochure"** that can be personalized to each of your **"Ideal Prospects"**.
4. Consistently mail or hand deliver a set number of **"Compelling Offer Brochures"** to your **"Ideal Prospects"** every week.
5. Use a **"Sweet Approach"** to get the gatekeepers of your **"Ideal Prospects"** to assist you in connecting with your **"Ideal Prospects"**.

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FLM, CFS, REC

93

Slide 94

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

Step 1: Build a "LinkedIn Prospect Bank" of "Ideal Prospects"

- Identify your "Ideal Prospect" based on your chosen market segment, demographics and social style.
- Clean up your LinkedIn network.
- Selectively invite your clients and contacts to join your LinkedIn network.



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94

Slide 95

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

Step 1: Build a "LinkedIn Prospect Bank" of "Ideal Prospects"

- In your LinkedIn under "My Network" go to "People You May Know" and scroll down. Invite everyone who meets your definition of an "Ideal Prospect".
- As your "Ideal Prospects" accept your invitations your "People You May Know" will be populated with their LinkedIn contacts some of whom will also meet your definition of an "Ideal Prospect".

This process continually repeats itself.



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95

Slide 96

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

Step 2: Create a Separate "Ideal Prospect List"

- Create an "Ideal Prospect" list with a specified number of "Ideal Prospects" (eg. 500) based on your chosen market segment, demographics and social style.
- If you have LinkedIn Premium invite each of your "Ideal Prospects" to join your LinkedIn.

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96

Slide 97

Directly Approach Your Ideal Prospects With a
Compelling Offer and Request That They
Contact You to Initiate a Business Relationship

Step 2: Create a Separate "Ideal Prospect List"

- Once an "Ideal Prospect" is on your "Target Prospect List" they stay on your list until they either specifically communicate to you, or take actions that communicate to you, that they will not be doing business with you, they die or they become a client.
- Every time one of these events occur add a new "Ideal Prospect" to your "Target Prospect List" so that you always maintain your specified number of "Ideal Prospects".

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FLML, CPSS, REC

97

Slide 98

Directly Approach Your Ideal Prospects With a
Compelling Offer and Request That They
Contact You to Initiate a Business Relationship

3. Create a "Compelling Offer Brochure" that can be
personalized to each of your "Ideal Prospects"

- Our brochure uses a cover that is a brief letter which is personalized to our "Ideal Prospect". Letters are printed individually on brochure stock and folded by a micro print shop.
- Inside left of the brochure has the same 3 point compelling offer.
- Inside right of the brochure has client testimonials with name, company name and brief summary of their company.

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FLML, CPSS, REC

98

Slide 99

Directly Approach Your Ideal Prospects With a
Compelling Offer and Request That They
Contact You to Initiate a Business Relationship

3. Create a "Compelling Offer Brochure" that can be
personalized to each of your "Ideal Prospects"

- The back cover provides a visual representation of what we will deliver to our "Ideal Prospects".
- Our brochure makes 2 calls to action for our "Ideal Prospect" to call or text myself on my mobile/cellular phone or to send me an email to arrange an introductory meeting. There is no indication that they will receive a follow up call from me.
- Our brochure includes credibility logos that our clients understand.

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99

Slide 100

Access
an Equal Housing Opportunity Equal Housing Lender

February 16, 2016

Mr. and Mrs. J. J. Smith
1234 Main St., Suite 100
Anytown, CA 90210


Dear Mr. and Mrs. Smith:

We are pleased to inform you that your application for a loan of \$100,000.00 at a rate of 4.5% per annum, with a term of 30 years, has been approved. The loan will be repaid in 360 monthly payments of \$500.00 per month. A copy of the Equal Housing Opportunity Equal Housing Lender notice is attached to this letter.

The loan will be repaid in 360 monthly payments of \$500.00 per month. A copy of the Equal Housing Opportunity Equal Housing Lender notice is attached to this letter.

The loan will be repaid in 360 monthly payments of \$500.00 per month. A copy of the Equal Housing Opportunity Equal Housing Lender notice is attached to this letter.

Sincerely,
Mr. John Doe, Vice President


John Doe, Vice President
5678 Elm St., Suite 200
Anytown, CA 90210
Phone: (555) 123-4567
Fax: (555) 987-6543
Email: john.doe@access.com
Web: www.access.com

This Document Relates To: 100-1234567-001

Slide 101

[illegible]

Slide 102

What My Clients Have Said About Me



During the past 10 years, George has been the Representative of Indiana's poorest and most underprivileged citizens. He has been a vocal and effective advocate for the poor, the high school seniors, the disabled, the elderly, the poor and the unemployed.

[View George's Testimonial](#)



George has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce.

[View George's Testimonial](#)



George has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce.

[View George's Testimonial](#)



George has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce.

[View George's Testimonial](#)



George has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce. He has helped me get my life back on track after a divorce.

[View George's Testimonial](#)

3 Strategies To Help You Reach America's Top 1% of the Super-Gearer G. Goodell, LLC
HALL OF FAME

Slide 103

The End Result

When you work with me, you will have a clear understanding of your financial future and how to achieve it. You will have a personalized financial plan that will help you reach your goals. You will have a clear understanding of your current financial situation and how to improve it. You will have a clear understanding of your future financial needs and how to meet them. You will have a clear understanding of your current financial situation and how to improve it. You will have a clear understanding of your future financial needs and how to meet them.

What It Will Cost For Me To Save You Money

I will work with you to determine your financial goals and needs. I will then create a personalized financial plan that will help you reach your goals. I will then implement the plan and monitor your progress. I will then adjust the plan as needed to ensure you are on track to reach your goals. I will then provide you with a clear understanding of your financial future and how to achieve it.

Let's Get Started

1. I will meet with you to discuss your financial goals and needs. 2. I will create a personalized financial plan that will help you reach your goals. 3. I will implement the plan and monitor your progress. 4. I will adjust the plan as needed to ensure you are on track to reach your goals. 5. I will provide you with a clear understanding of your financial future and how to achieve it.

George Givens, CEO, Givens Financial, LLC
 10000 N. 10th Ave., Suite 100, Tampa, FL 33604
 813.441.1000
 www.givensfinancial.com

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Slide 104

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

3. Create a "Compelling Offer Brochure" that can be personalized to each of your "Ideal Prospects"

- What we do is write a customized note on the cover page or attach a Post-it with a note on it to the **"Ideal Prospect"** which again indicates for the **"Ideal Prospect"** to call or text myself on my mobile/cellular or to email me to let me know what they think.

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Slide 105

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

3. Create a "Compelling Offer Brochure" that can be personalized to each of your "Ideal Prospects"

- When we send our brochure to an **"Ideal Prospect"** on my **"LinkedIn Prospect Bank"** I include in the note that we are connected on LinkedIn.
- We mail or hand deliver our **"Compelling Offer Brochure"** in a manila envelope addressed to our **"Ideal Prospect"** with the envelope marked "Private and Confidential". If it is hand delivered or delivered by courier we type this on the manila envelope.

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Slide 106

Directly Approach Your Ideal Prospects With a
Compelling Offer and Request That They
Contact You to Initiate a Business Relationship

3. Create a "Compelling Offer Brochure" that can be
personalized to each of your "Ideal Prospects"

- We have found that our "Compelling Offer Brochure" is a fantastic tool to use when asking our clients to refer "Ideal Prospects".
- What we do is ask our client to write a note to the "Ideal Prospect" that they are referring to us on the cover of our the brochure. We ask our client to include in their note their phone number in case the "Ideal Prospect" has any questions.

June 19th, 2018

7 Strategies to Help You Reach MORTY's Top of the Sales George G. Couder, TED
FLML, CPBA, RFC

106

Slide 107

Directly Approach Your Ideal Prospects With a
Compelling Offer and Request That They
Contact You to Initiate a Business Relationship

Step 4: Consistently Mail or Hand Deliver a set number of
"Compelling Offer Brochures" to both your "LinkedIn Prospect
Bank" and your "Target Prospect List" every week

- It has been our experience over a 25 year period using variations of our "Million Dollar Direct Marketing System" that we have consistently maintained a monthly 3% new client development rate.
- Each week we send out 12 "Compelling Offer Brochures" to "Ideal Clients" in my "LinkedIn Prospect Bank" and another 12 to "Ideal Clients" on our "Target Prospect List" which ends up being about 100 brochure that we mail or hand deliver monthly to our "Ideal Prospects".

June 19th, 2018

7 Strategies to Help You Reach MORTY's Top of the Sales George G. Couder, TED
FLML, CPBA, RFC

107

Slide 108

Directly Approach Your Ideal Prospects With a
Compelling Offer and Request That They
Contact You to Initiate a Business Relationship

Step 4: Consistently Mail or Hand Deliver a set number of
"Compelling Offer Brochures" to both your "LinkedIn Prospect
Bank" and your "Target Prospect List" every week

- We re-mail on a 2 month cycle. If an "Ideal Prospect" does not respond or we are unable to contact them after our 3rd mailing then we move them to our "Inactive Ideal Clients" list.
- When doing a re-mail we always do a variation of the note written on the cover page. An example of a variation would be having my assistant write the note asking the "Ideal Prospect" to contact them to let them know if they would or would not be interested in arranging an introductory meeting with me.
- Utilizing this marketing approach has resulted in us consistently developing 3 new "Ideal Clients" monthly.

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FLML, CPBA, RFC

108

Slide 109

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

5. Use a “Sweet Approach” to get your Prospects gatekeepers to deliver your “Compelling Offer Brochure”

- After sending 2 “Compelling Offer Brochures” to an “Ideal Prospect” if we still have not heard from them we identify who their gatekeeper is and send the 3rd “Compelling Offer Brochure” through them.
- I write a brief note to the “Ideal Prospect” on the cover of the “Compelling Offer Brochure” and I attach a post it note on the cover addressed to the gatekeeper indicating that as a thank you I have enclosed a box of chocolates.

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109

Slide 110

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

5. Use a “Sweet Approach” to get your Prospects gatekeepers to deliver your “Compelling Offer Brochure”

- When sending a “Compelling Offer Brochure” to an “Ideal Prospect” through their gatekeeper I will phone and follow up with the gatekeeper.
- I have found that if the “Ideal Prospect” is not available the gatekeeper is now an ally in assisting me to connect with them.

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110

Slide 111

Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship

- In order to reach your next level of production success you will need to increase the number of new “Ideal Clients” that you cultivate.
- A structured direct marketing system gives you control and consistency over the quality of prospects you develop and the frequency at which you develop them, which will support you in reaching your next level of success.

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111

Slide 112

7th Strategy

Surround Yourself with an Exceptional Team

June 14th, 2015

7 Strategies to Help You Reach MORTY's Top of the Table George G. Givens, TED PLM, CPIM, REC

112

Slide 113

Surround Yourself with an Exceptional Team

Every Top of the Table member that I know will tell you that having an exceptional internal and external team is critical in order to maximize your production potential.

June 14th, 2015

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113

Slide 114

Surround Yourself with an Exceptional Team

One of the best investments that you can possibly make is to hire a top assistant to take care of all the day-to-day details that can interfere with you being able to work with clients and potential clients on revenue generating activities.

June 14th, 2015

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114

Slide 115

Surround Yourself with an Exceptional Team

One of the next best investments you can make is to hire a second assistant. Hiring someone to work with you should never be seen as a business expense but rather as an investment.

June 14th, 2015

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115

Slide 116

Surround Yourself with an Exceptional Team

- There is a certain amount of faith that is involved in hiring someone. The faith is not in the individual you hire but rather the faith you have in yourself.
- When you hire someone it is an investment in leveraging your time to produce an increased level of results. When you hire someone you should expect to double your investment in the first year.

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116

Slide 117

Surround Yourself with an Exceptional Team

If you want to exponentially increase your production results in order to reach the Top of the Table production level believing and investing in yourself through building a support team is a must.

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117

Slide 118


2 Critical Team Members

- Personal Assistant.
- File Preparation Specialist.

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Slide 119

What do Wayne Gretzky, Michael Jordan, Tom Brady and Jordan Spieth all have in common?



June 14th, 20187 Strategies to Help You Reach MORTY's Top of the Sales George G. Goslin, TED FLAM, CPIM, RFP119

Slide 120

If you don't already have a business coach get one and/or join a coaching program.

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Slide 121

Surround Yourself with an Exceptional Team Summary

We can't do it alone. In order to increase our production and move to our next level of success we must harness our existing human resources as well as to cultivate new human resources.

June 14th, 2018

7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, CEO
FLMI, CFA, RBC

121

Slide 122

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- We started by establishing that we all want to reach the Top of the Table sales production level.
- We then talked about how in order to increase our current level of production we would have to either:
 - Increase the number of sales we make.
 - Increase the size of sales we make.
 - Some combination of the two.

June 14th, 2018

7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, CEO
FLMI, CFA, RBC

122

Slide 123

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- We discussed that we all already have the “know how”.
- We then identified our barriers and that given that there is no MDRT Magic Wand, if it meant saving the life of a loved one, we would immediately do whatever it takes to address and deal with our barriers.

June 14th, 2018

7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, CEO
FLMI, CFA, RBC

123

Slide 124

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- We talked about motivation and how we must first have sufficient internal motivation or a good enough reason in order for us to take action.
- We then talked about how when we make a decision to hold ourselves to a higher standard of what we believe we are capable of or deserve we create for ourselves a reason, or the motivation, to take action.
- We also talked about how a decision to hold ourselves to a higher standard arises out of wanting more or better for ourselves when we are no longer willing to settle for where we are at right now.

June 14th, 2020

7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, TED, FLMI, CFP®, RIC

124

Slide 125

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- We then transitioned into the 7 Strategies.
- The 1st Strategy was “**Set Bigger Lifetime Goals**” and we talked about how lifetime goals give us “**a reason**” or the “**motivation**” to pursue our richest, fullest life experience.
- We discussed how **Lifetime Goals** bring passion, excitement, enthusiasm, confidence and energy into our daily experience that gives us a competitive advantage in the business arena.

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125

Slide 126

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- We then went to the 2nd Strategy which was “**Use Natural Methods to Alter Your Bio-Chemistry in Order to Increase Your Level of Passion, Excitement, Enthusiasm, Confidence and Energy.**”
- We talked about the physiological and psychological benefits of exercise and meditation-mindfulness and how this can give us a competitive advantage when we show up in the business arena.

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126

Slide 127

7 Strategies to Help You Reach MDRT's Top of the Table Summary

The 3rd Strategy was to **"Master How You Allocate Your Time"** and we talked about 3 approaches to support is in mastering how we allocate our time.

1. Developing **"The Skill of Saying Yes to What Matters Most and Saying No to What Does Not Matter Most"**.
2. **"Identify and Execute Your Highest Priority Revenue Generating Activities Daily"**, and;
3. **"Recognize and Place a Higher Value on Your Time"**.

Carpe-Diem. Seize the day...Make your lives extraordinary.

June 14th, 2020

7 Strategies to Help You Reach MDRT's Top of the Table George G. Givens, TED
FLMI, CFA, RBC

127

Slide 128

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- The 4th Strategy was **"Identify and Conquer Your Barriers"**. We discussed how we can reframe our **"barriers"** into **"challenges to be solved"** and then to solve the challenge by identifying our **"obstacles"** and our **"strategies"** to deal with them.

June 14th, 2020

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FLMI, CFA, RBC

128

Slide 129

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- The 5th Strategy was **"SPECIALIZE"**. We discussed 4 ways in which to specialize. The first was **"Product Offering"**, the second was **"Market Segmentation"**, the third was **"Demographics"** and the fourth was **"Social Style"**.
- We covered that specialization is the most efficient approach to increasing your production level in order to reach your next level of success and that the vast majority of the highest producing advisors are specialists.

June 14th, 2020

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FLMI, CFA, RBC

129

Slide 130

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- The 6th Strategy was **“Directly Approach Your Ideal Prospects With a Compelling Offer and Request That They Contact You to Initiate a Business Relationship”**.
- We talked about how directly approaching LinkedIn contacts and targeted **“Ideal Clients”** would enable us to cultivate **“Ideal Clients”** so that we can increase our production level.

June 14th, 2023

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130

Slide 131

7 Strategies to Help You Reach MDRT's Top of the Table Summary

- The 7th Strategy was **“Surround Yourself with an Exceptional Team”**.
- We discussed how in order to increase our production we must harness human resources.
- We also discussed that all top performers have coaches to help them maximize their performance.

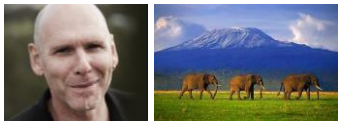
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131

Slide 132

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132

Slide 133

The Top of the Table is within your reach. Are you ready to grab it?

I look forward to seeing you at the Top of the Table.

June 14th, 2018

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RUMI, OTIS, BPC

133
