

A decorative graphic at the top of the page features a large, stylized bracket. The left side of the bracket is a thick black 'L' shape. The right side is a teal 'J' shape. A horizontal bar with a yellow-to-white gradient passes through the center of the bracket.

5QES Client Advisory Board System

**5QES Special Forces Edition
Creating 20 “Super” Clients**

Mike Kaselnak
Founder of 5Q Group

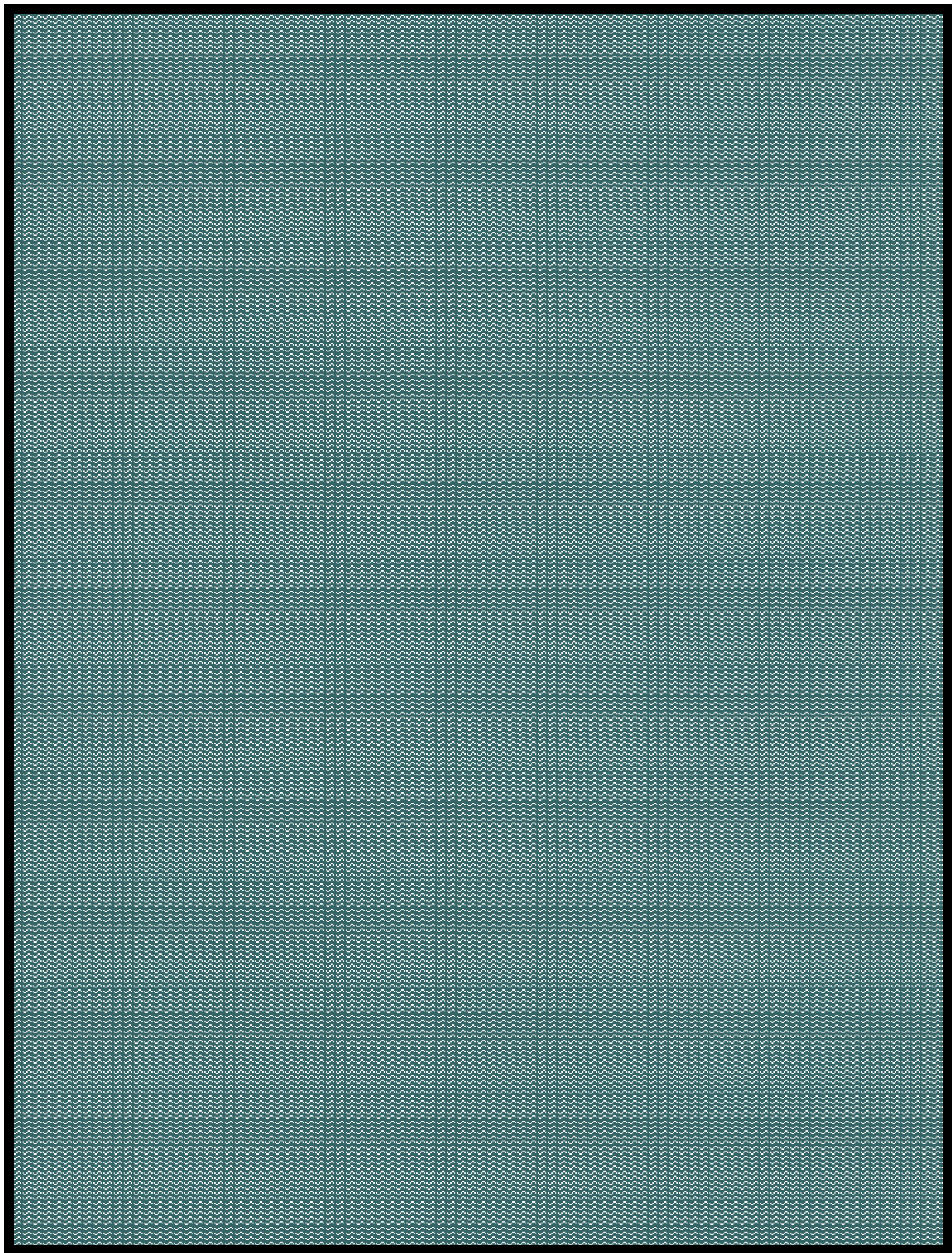


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Building “Super Referrers”



The best source of new business is in your existing book, and the best way to tap into that is establishing a Client Advisory Board. I call this system the Special Forces System because these people can become “Super Referrers”. A small group of clients that with your training can produce 60 new clients a year.

If you run a small to mid-size practice, you need a mechanism to guarantee that you stay focused on what will grow your business. In any business it is dangerous to simply rely on one person’s opinion or intuition as to what your clients want. A Client Advisory

Board supplies you with varied perspectives by utilizing your clients as a sounding board, who in turn will give you direct and frank feedback on your new ideas and initiatives.

Client Advisory Boards are incredibly valuable. They create evangelists for your practice. You will be amazed at how your clients view the success of you and your practice. They want you to be successful, because they want you to be around to continue to give them the good service you have been. Your clients will do almost anything they can to help you stay or become successful. As a result, the feedback you get from a Client Advisory Board is of extremely high value.

Why Invest Your Time and Effort into a Client Advisory Board

A small cost, time, money and effort, is required to create and run a Client Advisory Board—but it is well worth it.

Some of the benefits you reap from your Client Advisory Board include:

- ◆ Ideas that you would never have come up with yourself, the feedback will blow you away.
- ◆ How to capture more of your client’s money.
- ◆ Ideas on better ways to market to get new clients.
- ◆ Ideas on how to run your practice more efficiently.
- ◆ Building stronger and more meaningful ties to your clients.
- ◆ Gaining critical insights by seeing your customer service from your client’s point of view.
- ◆ Receiving direct customer feedback on how your services and products are perceived by your clients and prospects.
- ◆ Ideas on how to produce more referrals. Don’t miss the Special Forces version of the CAB, on Page 13 (although referrals are not the primary focus, it certainly can be the icing on the cake).

Creating a Client Advisory Board of your key clients can provide an opportunity to gain valuable insight into the concerns of your clients. You will also forge stronger client bonds that are important on many levels, the least of which is referrals and new prospects.

The level of customer knowledge that you glean from this venture will allow you to completely outpace your competitors due to your “insider knowledge” on what it is your clients want. Though Client Advisory Boards need a little elbow grease to get started, they are also a proven path to success. Client Advisory Boards are a win-win for both you and your clients.

What Is It That You Want to Accomplish With Your Advisory Board?

The first step in forming a Client Advisory Board is to brainstorm what it is that would provide the biggest boost to your business. Is it:

- ◆ Improving your operational or strategic issues?
- ◆ Creating a plan to grow your practice?
- ◆ Creating better marketing?
- ◆ Taking your practice a different direction?
- ◆ Adding new products or services?
- ◆ Or, to create a Special Force of “Super Referrers”.



Never select more than 2 or 3 topics in any particular year—stay targeted.

What is your mission? What are you trying to achieve? Your decision will affect your choice of people for your Client Advisory Board.

Remember, each year you can have a different focus. This allows you to invite a different set of people best suited to the focus for that year.

Who Should You Have on Your Client Advisory Board?

Who should you invite? As stated above, it depends upon what you are trying to accomplish.

- ◆ If you are looking to improve your marketing
 - Invite people that you would want to duplicate—they will tell you how to attract people just like themselves.
- ◆ If you are trying to improve operations
 - Invite people with administrative backgrounds—people that are very organized and appear to understand customer service. They have the expertise and experience to deliver excellent feedback and suggestions

There is no perfect choice for Board Members, but here are some ideas to get you started:

- ◆ New clients - for marketing and client experience topics
- ◆ Non-clients - for marketing topics
- ◆ Mixed clients - for client service issue topics

- ◆ Your best clients - for practice growth and referral topics such as revenue generation ideas, assets under management, centers of influence, etc.
- ◆ Centers of influence - for how to grow through networking
- ◆ Niche market - for how to grow in that particular niche or how to serve that niche better
- ◆ Expertise market - for special topics that you might want feedback on such as software or operational systems, IT or client service

In general, you should review your client database and select approximately 20 potential board members that:

- ◆ Are congenial
- ◆ Have the breadth of knowledge on the subject you have chosen
- ◆ Are enthusiastic and willing to speak their minds
- ◆ Are demographically diverse—young/old, men/women, etc.

You should ideally have 8 to 12 board members. You will need to invite 20 potential board members so if some people are not able to serve on your first Client Advisory Board, you will still be able to assemble at least 8 to 12 people.

Creating Your Board

Now that you have targeted 20 potential board members, you need to invite them to participate. This is best done with a face-to-face visit so that you can explain the purpose of the Client Advisory Board and answer any questions they may have. If this is not possible, then you may also do it by phone.



When you invite potential board members, let them know:

- ◆ You are interested in improving your service and building your business, and you feel that regular input from a select group of your best clients can help you do that...you will be surprised at how many people will jump on board to be part of this.
- ◆ You specifically chose them as one of the select people to serve on your Client Advisory Board due to your belief in their skills, experience and knowledge that they will bring to the table...and mean it.
- ◆ The topics you wish the Client Advisory Board to help guide you on.
- ◆ The tenure would be a minimum of one year and a maximum of two years—they would have the right to discontinue at any time.
- ◆ You plan to meet two or three times a year for about two hours.

Where and When to Have Your Meetings

There is no best time or place to have your meetings. For the first meeting, choose a time and place that you think will be convenient for everyone. Then, at the first meeting, start by discussing the best time and place to meet for future meetings.

Successful Client Advisory Board meetings have been conducted:

- ◆ Over a long lunch at a restaurant in a private room. You will need about 1 1/2 hours to allow for socializing before lunch and to conduct the meeting over a casual lunch.
- ◆ Over dinner at a country club (beginning at 6:00 PM and wrapping up by 8:30 PM)
- ◆ In a conference room with catered food
- ◆ You could even consider during the day (if board members are available and not working)

As long as people are comfortable, it really doesn't matter where or when the meetings are held.

Inaugural Meeting

Your first meeting with your Client Advisory Board will include a couple of extra items that the following meetings will not. You should do an "inaugural meeting" every time you have a new set of board members.

Begin your inaugural meeting by having each person explain how they became your client. You're hoping the subject of referrals comes up and they start thinking of people they should refer.

After everyone has had a chance to talk, present your agenda.

Your agenda should include guidelines for the board, and expectations of its members. Include items such as:

- ◆ Board's purpose
- ◆ Number of meetings per year. Agree upon the time and place of future meetings so that everyone knows the meeting dates and can coordinate schedules for the next 12 months
- ◆ Policy and meeting attendance
- ◆ Preparation required before meeting
- ◆ Tenure of appointment
- ◆ Payment/Thank you gifts to board members (if any)

After agreement of the above items go over the general ground rules:

- ◆ Don't take anything personally.
- ◆ Don't talk about personal or private issues.

- ◆ Don't discuss individual account concerns.
- ◆ Do be cordial and courteous.
- ◆ Do participate and voice your opinions.
- ◆ Do be considerate to other members by being on time and attending the meetings.

It is also a good idea to elect a chairperson. The chairperson should be the point of contact between you and the advisory board members. If someone has a concern with the board they can contact the chairperson who can then contact you with the concern and maintain anonymity.

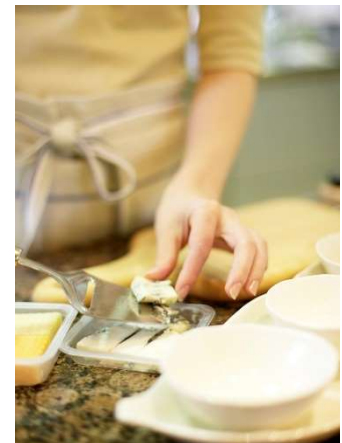
Be sure to communicate to the board members that their purpose is to generate ideas, give feedback, and provide guidance and accountability. Also, be up front with them that the Client Advisory Board does not have authority over your practice and that not every idea will be implemented. However, be sure they understand that every idea and comment will be seriously considered and will carry great weight with you.

What to Prepare for Regular Meetings

You **MUST** be prepared for these meetings! You should know your primary goal going into the meeting. Each meeting must be informational for you and interesting to them. Rambling or poorly-run meetings will not only dilute your findings, but they will crush future attendance!

Prior to the meeting:

- ◆ Prepare a succinct agenda with two or three topics at most
- ◆ Send agenda to each member in advance with a reminder of the time and place for the meeting
- ◆ Arrange meeting location and food
- ◆ Have all necessary equipment ready to go—white board, pads of paper and pens for each participant, projector (if necessary), etc...



At the meeting:

- ◆ Socialize to warm people up
- ◆ Remind them of the ground rules
- ◆ Give them an update on the actions taken based on their suggestions from the last board meeting
- ◆ Present the agenda and the information you would like to leave with in order to consider the meeting successful

You will then begin the meeting. Remember, you are the facilitator, **NOT** the speaker. Your board members should be doing 90% of the talking. The purpose of these meetings is to gather **THEIR** feedback and suggestions...not to hear your own voice.

Try to keep the meeting moving forward and focused on the topics at hand. However, if the meeting takes an unforeseen turn, acknowledge that although the topic is not on the agenda, you believe it will provide valuable insight and you could place the topic as a future agenda item.

Try also to keep to the time stated for the meeting. However, if the participants are really getting into the discussion and don't want to leave, feel free to go longer.



Idea Starters for Topics

Though you really should brainstorm to come up with topics that you feel you will most benefit from your Board's feedback about some advisors have trouble getting their brainstorm started.

I've created a list of some possible topics that you could present to your Client Advisory Board.

- ◆ What do you want from your advisor?
- ◆ What do you think of my marketing materials?
- ◆ How might I change my marketing approach?
- ◆ What do you think of my newsletter?
- ◆ What's good and bad about my current service?
- ◆ Are there services that I am missing?
- ◆ Is our office location convenient?
- ◆ Should we have estate planning?
- ◆ Have I earned the right to ask for referrals?
- ◆ Have I done a good job conveying a full range of financial solutions?
- ◆ What does our staff do well? How could we improve?
- ◆ How can I communicate better to my clients about all the other services that I offer?
- ◆ Do you think this particular product would be good to show to my clients?
- ◆ Do you think I should invest in a software program?
- ◆ What did you think of our last client appreciation event?
- ◆ How do you think I could better incorporate other professionals in my practice?

Although you should have prepared questions for the meeting always make sure you're comfortable asking the board questions as they occur to you. Not all sessions will follow the agenda—some of the unpredictable twists can actually be your best meetings and give you the best findings.

After Your Board Meeting

Always send a handwritten thank you note to each board member following every meeting. Attach it to a summary including:

- ◆ Topics covered
- ◆ Summary of suggestions
- ◆ Actions you plan to take

I would also recommend that you include a small gift of appreciation. If possible make it personal to the participant (e.g. gardeners would receive a gardening gift, golfers a golfing gift, etc.) A hassle? Absolutely. But it will pay off in huge dividends of referrals and new money.

Don't Forget Your Staff and Client Base

Be sure to keep your entire circle in the loop:

- ◆ You should schedule a staff meeting the day after each Client Advisory Board to go over results and discuss if actions are necessary.
- ◆ Send a summary to board members who were unable to attend.
- ◆ Inform your entire client base regularly via monthly newsletters, annual meetings or client appreciation events, the work you are doing with the Client Advisory Board. Let them know that they should contact you if they would like to participate.

Once you have your Client Advisory Board running smoothly, consider asking members to bring a friend or colleague along to one of the meetings (not every meeting). This allows you get the opinions of people you don't do business with.

Something to Keep in Mind

Do's

- ◆ Do invite only the right people to be on the board. Make a personal phone call or visit with them first to explain what it is.
- ◆ Do have a variety of clients on the board—age, race, gender, etc.
- ◆ Do set the entire year's meeting schedule for the meetings in advance.
- ◆ Do **prepare... prepare... prepare.**
- ◆ Do LISTEN and record if possible (digital audio recording only; video is not needed and is obtrusive).
- ◆ Do review each member's contribution each year—attendance, preparation, contribution. If it is not up to par, schedule a time to meet with them to ask if there is something you can do to encourage their participation. Let them know that if they are too busy, you understand and they can step down and try again another year.
- ◆ Do remember this is not a formal focus group or a client appreciation event. If you're not prepared to listen to them and act on their suggestions, you run the risk of alienating some of your best clients.

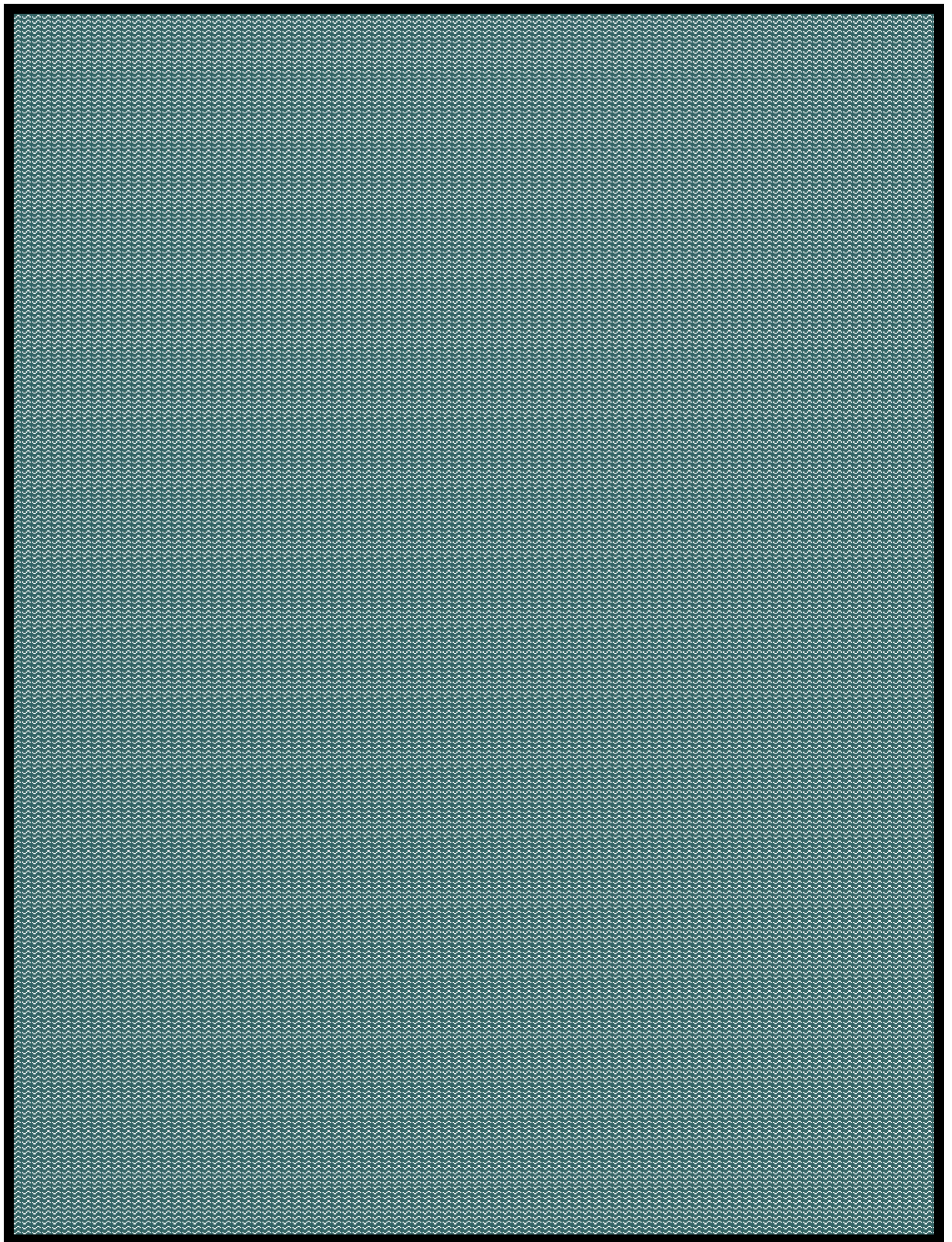
Don'ts

- ♦ Don't just jump into a Client Advisory Board, put some thought into it. Know what you want and why you want it.
- ♦ Don't ignore the board's advice. Even if you don't like what the board suggests, you have an obligation to act in some way and to explain it to them. You need to tell them what you did and what you did not do...and why.
- ♦ Don't allow your feelings to get hurt or take things personally. If you're not open to honest feedback, don't have a Client Advisory Board.
- ♦ Don't ramble on or talk too much.
- ♦ Don't try to control the suggestions in the meeting—remember you are gathering their feedback.

Good Luck and Have Fun with It!!!

If your Income has plateaued... if you are spending more money but seeing less people... if it's time for a change, we're interested in speaking with you. For over a decade, Mike Kaselnak has been quietly taking good producers to levels three and four times their income level, within three years of using the 5Q system.

*If you would like information on this or other proven business builders, please contact 5Q at:
Email: support@5qgroup.com | Phone: 1-877-941-9710*



Special Forces Edition

5QES Special Forces Edition

Creating 20 “Super” Clients



Special Forces Edition

If you are familiar with the 5Q Elevator Statement you understand that its power lies in its ability to get people to say,

"Really? How does he do that?"

Generally, when your good clients try to refer to you by saying, "Say, you should work with my advisor, he's done a real good job for me. He really helped me get ready for retirement and has done great with my investments."

How is that received? What do the people they approach usually say?

"Sounds interesting but I already have a guy that's done a good job... say, maybe you should talk to him?"

When your client hears this what do they feel? Rejected. Now we're in the business of rejection and we hate it... so how do you think your client feels? When will they try to refer you again? Never.

The 5Q Elevator Statement (5QES) was developed specifically to not only overcome this hurdle, but to turn it into a rewarding experience for your client. Do people like to know things other people don't? Sure. Do they like to have things other people don't? They sure do!

When properly constructed, the 5QES will get the client's friend to say, "Really? How does he do that?"

When your client hears this, how does it make them feel? They feel good! They know something their friend doesn't know and they have something their friend doesn't have. This makes them feel good and important. When this happens you get two things:

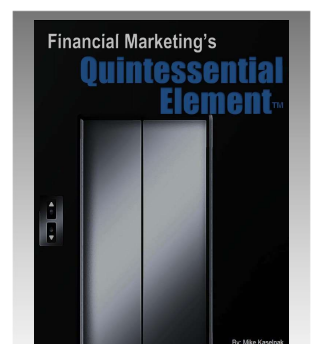
1. A client that wants to refer again
2. An interested person that wants to talk to you about what you do

**If you have not yet downloaded the step-by-step free eBook
Financial Marketing's Quintessential Element™ on how to create
your own killer 5Q Elevator Statement , you should go here:
<http://www.5qgroup.com/tools/eBook.pdf>

How We Leverage the 5QES

What would you think about having 8 happy, motivated clients, approaching 10 people each with your 5QES? How many possible referrals is that?

That is exactly what we accomplish with the 5QES Special Forces system.



[Click to Download](#)

Special Forces Edition

You are going to have the Client Advisory Board (CAB) work with you to create a killer 5QES. You will let the CAB members know that the goal for the board is to create a succinct statement that will become your tagline, a tagline that isn't just a clever little phrase... but actually a phrase that can create a driving interest in what you do for people.

You are going to walk the board through the 5Q discovery process and facilitate a 5QES. As you recall, those steps are as follows:

1. Something that only you can claim—none of your competitors are claiming it
2. Brief and repeatable—one sentence
3. Addresses something that your target market is afraid of... frustrated with... or has an extreme desire for
4. Is extremely specific
5. Has a "because" of the solution

Then, test it on at least 10 people in your target market. If at least 50% say something like, "Really? How does he do that?" ...then you have a killer 5QES.

So here's the thing, once the board has helped to develop the 5QES, they own it. When they own it, they will be proud of it... they will want it to work. And they should be onboard with testing it on 10 people they know. That will be their final assignment...to test it out on 10 people each.

Not all of your CAB members will do it, but most will... you may not get the full 80 but you will get your 5QES being shared with 40 or 50 people and about half of them coming to see you... and as you well know, you will never have a higher closing ratio than with a referral.

So in summary—you will conduct 3 to 4 CAB meetings and see a huge influx of referrals.

Please make sure you have read the complete 5QES Client Advisory Board (CAB) System before reading this special edition. The Special Forces CAB is simply a very focused CAB. You will need to follow all of the general steps of the 5QES CAB and then apply the Special Forces template on top of the general CAB.

What is the Special Forces CAB?

The Special Forces CAB was developed specifically to create referrals. If done properly you will net 20, or more, high quality appointments (referrals are the highest quality appointment you can get)...

every time you do a Special Forces CAB. Your closing rate will be extraordinarily high with these people.

If you do three of these special CAB's a year you will bring in up to 60 referrals per year. Your return on investment with this system is higher than any other marketing system (other than possibly the Golden Referral System).

It is well worth your time and investment.

Who Should You invite to be on Your Special Forces CAB?

The answer is obvious, those clients you wish to duplicate. This system is designed to get the members to refer you to 10 of their family, friends and colleagues, as you will see when we get into the details. That being the case, choose potential members that you love as clients, because they will most likely run with people similar to themselves.



Creating Your Board

You will do this in the exact same manner as was outlined in the general 5QES CAB system with one exception. The tenure will be much shorter and you will only have 3 meetings.

What to Prepare for Meetings

You **MUST** be prepared for these meetings! You should know your primary goal going into the meeting. Each meeting must be informational for you and interesting to them. Rambling or poorly-run meetings will not only dilute your findings, but they will crush future attendance!

Prior to the meeting:

- ◆ Prepare a succinct agenda creating an effective 5Q Elevator Statement
- ◆ Send agenda to each member in advance with a reminder of the time and place for the meeting
- ◆ Arrange meeting location and food
- ◆ Have all necessary equipment ready to go—white board, pads of paper and pens for each participant, projector (if necessary), etc...

At the meeting:

- ◆ Socialize to warm people up
- ◆ Remind them of the ground rules
- ◆ Give them an update on the actions taken based on their suggestions from the last board meeting

- ◆ Present the agenda and the information you would like to leave with in order to consider the meeting successful

You will then begin the meeting. Remember, you are the facilitator, NOT the speaker. Your

board members should be doing 90% of the talking. The purpose of these meetings is to gather THEIR feedback and suggestions...not to hear your own voice.

Try to keep the meeting moving forward and focused on the topics at hand. However, if the

meeting takes an unforeseen turn, acknowledge that although the topic is not on the agenda, you believe it will provide valuable insight and you could place the topic as a future agenda item.

Try also to keep to the time stated for the meeting. However, if the participants are really getting into the discussion and don't want to leave, feel free to go longer.

Inaugural Meeting (first meeting)

Your first meeting with your Special Forces CAB will include a couple of extra items that the following meetings will not.

- *Begin your inaugural meeting by having each person explain how they became your client.*
- *After everyone has had a chance to talk, present your agenda.*

Your agenda should look like the following:

MEETING AGENDA

- ◆ Goal of Client Advisory Board – Create a succinct statement that will become your tagline. Remember, a tagline just isn't a clever little phrase... but actually a phrase that can create a driving interest in people for what you do.
- ◆ Tools – A proven system called 5Q Elevator Statement System
- ◆ Number of meetings – 3 meetings (including today)
- ◆ Preparation for meetings – None required, just brain storming
- ◆ Thank You Reward – Gift Certificate for ----- (advisor's choice)

After the group's agreement of the above items go over the general ground rules:

- ◆ Don't take anything personally
- ◆ Don't talk about personal or private issues
- ◆ Don't discuss individual account concerns
- ◆ Do be cordial
- ◆ Do participate and voice your concerns
- ◆ Do be considerate to other members by being on time and attending the meetings.

You will be the facilitator for these meetings. First, be sure to communicate to the board that their purpose is to generate ideas, give feedback, and provide guidance and accountability.

Also, be up front with them that the board does not have authority over your practice and that not every idea will be implemented. However, be sure they understand that every idea and comment will be seriously considered and will carry great weight with you.

First Meeting Outline

1. Ground rules see above
2. Goal of the Client Advisory Board (CAB)
 - Develop a succinct tagline that creates interest in your business
3. Why is this needed?
 - In our industry, we all look alike
 - I must describe what I do in a manner that immediately sets me apart
 - I can use this in a number of ways
 - When people ask me what I do
 - When clients want to introduce me to someone they know
 - On my business cards, etc.
4. New research has shown exactly how to do this
 - Introduce the 5QES System to them
 - Walk through the case study (see addendum)
5. Begin brainstorming through the 5 steps to create a 5QES
 - "What do you think I do that other advisors don't do?"
 - Come prepared with your own ideas to salt in as well
 - Begin listing them on a white board
 - After you have a full list, begin to rank them by uniqueness—tossing things that your competitors are already claiming

Note: You can also have a 5QES already developed and then guide the board with ideas you've already thought about—and get their opinions.

 - Work your way through the rest of the steps in a similar manner
6. Stop the first meeting at the time promised.

Second Meeting Outline

1. Pick up and finish the rest of the steps
2. When the group is finished with the 5QES, get their opinion of what would happen if you ran into someone on the street and they asked you what you did...
 - If you used this 5QES, would they ask, "Really, how do you do that?"
 - If no, then back to the drawing board
 - If yes, continue to item 3
3. Discuss the final step of the 5QES process which is to try it out on 10 people and if 5 people say something like, "Really, how do you do that?" –we have a winner!
4. Ask if they think at least 50% of people would be curious enough to ask that question.
5. If they say yes, ask if they could do you a huge favor and between now and the next meeting share the new 5QES with 10 people they know and keep track of the percentages.
 - Make the last meeting a "celebratory" meeting at a nice restaurant or something really nice to thank them for their help.
 - This will make them feel more like helping your out and showing up for the last meeting

Final meeting outline

1. Make it a fun night. About 15 minutes into the get together thank them once again for helping you and work around the table to get their results.
 - "I want to thank you all again for all the great input and help that you've given me over the last few weeks! It's been amazing and I can't thank you enough! I guess the one final bit of business before we enjoy the rest of our evening is to get the results of the 5QES. Did it work? Who tried it out?"
 - Work your way through all of them to gather their input.
2. After the results, spend the rest of the night just having fun with these great clients.

The day after

Send a handwritten thank you note to each attendee.

Three Days after

Follow up with a phone call to thank them for their participation and ask if they could give you any additional input on how the conversations they had with their friends or relatives went... very low key... most will begin to open up and share who they talked to and this is when you begin to harvest the referrals.

Addendum

Case Study

The Challenge

Seven years ago a financial advisor client of mine came to me for help. Larry was struggling. He had been in the financial business for 15 years and specialized in working with teachers. Larry's problem was that he had spent a little over \$20,000 in all types of marketing over the last six months. He had done a seminar that flopped. Sent out thousands of postcards, with very little effect and had even tried hiring a cold calling service to help him to get in front of his target market... all to no avail.

Larry's income had been bouncing between \$100,000 and \$125,000 for the last five years, but after expenses, taxes and marketing costs... his take home was less than \$50,000 a year. He was questioning his future in the financial business.

His clients loved him. He knew he could help teachers if he could get in front of more of them, but how? He was out of money to even do one more marketing campaign.

The Solution

Larry needed a way to get in front of new prospects that were either free or very low cost. Thus began the creation of the 5Q Elevator Speech. I spent hours on the phone with Larry helping to clarify exactly what he did for his teacher clients... what he was doing that was different from what all of his competitors were doing or saying.

We really drilled down to the most specific and nitty-gritty techniques that Larry was using to help his clients. He laid out for me exactly how he was able to help his clients glean thousands more from their retirement than other advisors were able to do. He understood how his state's teacher's pension plan worked and how to integrate it with Social Security and his client's 403b's.

During these conversations we began to craft his marketing message. We knew it had to have the following 5Q characteristics:

1. Claim something that none of his competitors claim
2. Be only one sentence long
3. Address a fear, frustration or aspect of greed that teachers had
4. Be very specific
5. And give the "because" of the solution

Here's what we came up with:

"I help teachers in Bernalillo county increase their monthly retirement income by an average of \$441 a month using HB313, a loop hole only available for the next 2 years."

I then had Larry choose his 10 favorite clients. He hosted a dinner at a favorite local restaurant where he acknowledged that everyone there had tried to send him referrals in the past but that those attempts had been met mostly with rejections... with their colleagues saying, "Yeah, sounds good, but I already have a guy."

Larry admitted that he wouldn't even want to refer somebody if that was the reception he got. His clients were both humored and relieved that he understood their position.

He unveiled his new 5Q Elevator Speech (5QES). He asked his clients there what they thought.

They all got excited and asked him exactly how he did that... He explained that he had already helped them all do exactly that but he didn't want to blow his own horn. After they understood this, he asked if they would try, just one more time, speaking with their colleagues using his new 5QES. They all agreed and he handed them each 10 business cards with his 5QES on the back.

The Result

During the remaining 6 months of the school year...

Larry received 55 referrals.

Of those 55 referrals, 48 became clients.

The average new client had \$81,000 in new assets for a grand total of \$3.9 million of new money brought in.

Larry made \$233,280 in just 6 months... with zero marketing cost.

You can imagine both Larry and my delight at those phenomenal results... 48 new clients... \$3.9 million in new money... and the marketing didn't cost a dime!

