

ARKSHIRE'S 10 STEPS TO A FAST START SYSTEM CHECKLIST

FOLLOW PROVEN SUCCESS FORMULA



- ☐ Register for the Next Wealth Builders Conference
- ☐ Make a Commitment! Your First 6 mo. is a Learning Experience
- ☐ Sign-Up for ExamFx Prelicense Course
- ☐ Complete Your Personal Financial Needs Analysis
- ☐ Establish Your Personal Candidate List
- ☐ Schedule Your First 4 Financial Workshops ASAP
- ☐ Roleplay and Invite to Workshops Using the Proven Script
- ☐ Field Train with Qualified Field Trainer (10 appointments min)
- ☐ Schedule Your State License Exam
- ☐ Promote to Associate - (3) Policies (2) Trainees (1) Month

SET UP YOUR FINANCIAL WORKSHOPS

NOTE: Only focus on one financial workshop at a time

INVITE 60 PEOPLE IN 15 DAYS

- Focus on "A" players • Business owners • \$100k+ earners
- Schedule 4 Financial Education Workshops within 15 days

1.	DATE	TIME	3.	DATE	TIME
2.	DATE	TIME	4.	DATE	TIME

INVITATION SCRIPT

1. CLEAR THEIR SCHEDULE

Do you have a quick second? (wait for response)
I'm glad I got a hold of you.
What are you doing on (date and time)?

2. INVITE

I recently started working with a financial firm and part of my certification training is to share some financial education with 10 people. I am hosting a Financial Education Workshop on ____@ ____.

The info that will be shared is really beneficial and there is no obligation, As a favor to me can you please attend?

IF THEY HAVE QUESTIONS

- Remember, this is for my Certification Training. Can you help me out?
- It will take less than an hour
- 3 factors that impact your retirement and how to avoid them

GUIDELINES TO FOLLOW

- Over invite. The reality is that 40% of your invites won't show.
- Confirm guests the night before or morning of your meeting.
- Do not invite through texting, email or social media!

WORKSHOP CHECKLIST

PREPERATION IS KEY. BE READY AND ORGANIZED

- ☐ Cool room temperature
- ☐ Eliminate distraction (kids, pets, etc)
- ☐ Flat Screen TV available with remote
- ☐ Upbeat music BEFORE and AFTER the presentation
- ☐ Sign in sheet (with host as first attendee)
- ☐ 12 Pack 5"x 8" writing note pads & pens
- ☐ Response cards (printed on stock paper in color)
- ☐ Refreshments, light snacks for after the presentation

STARTING YOUR WORKSHOP

YOUR GUESTS FIRST IMPRESSION WILL BE YOUR WORKSHOP. MAKE IT GREAT!

- Introduce your guests to the presenter
- Be positive regardless of how many guests show up
- Only set out a minimum number of seats. If more guests than expected come you can add seats rather than having empty chairs with no one in them

AS THE HOST, YOU SET THE TONE OF YOUR MEETING.

INTRODUCING AND EDIFYING THE PRESENTER

ESTABLISH THE CREDIBILITY OF THE PRESENTER

It gives the presenter power to move your guests into action!

- With a smile and excitement here is what you should say:
Thank you for being here to learn more about my firm. At this time, please eliminate any distractions and hold all of your questions until the end. I am very excited to bring up our very special guest speaker. (Continue with Edification...)

GENERAL EDIFICATION

This individual is leading the expansion in this area. Not only has he/she done very well for himself/herself, but he/she has truly been an educator and advocate for people like us. He/she teaches valuable insights and strategies that help people easily and effectively secure their long-term investments. Right now he/she will be going over some important financial principles. Please help me welcome to the front of the room, Mr./Mrs. _____

AFTER THE PRESENTATION

- After the presentation, turn the music back on and help the presenter sort the room
- Avoid the group question and answer session. This will encourage clients to set up an appointment to get their questions answered.
- Break up the room and make sure excited guests have a chance to speak to the presenter and learn more information
- Make sure everyone fills out their response cards before they leave. This is vital to the growth of your business
- Set up as many appointments as possible