



SCRIPTING

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SCRIPTING CLASS AGENDA



- **The Business Format System**
- **Step2: Approach/ Contact**
 - Scenario Of Disaster
 - Who and how can we help?
 - Golden Triangle- unlimited referrals and clients



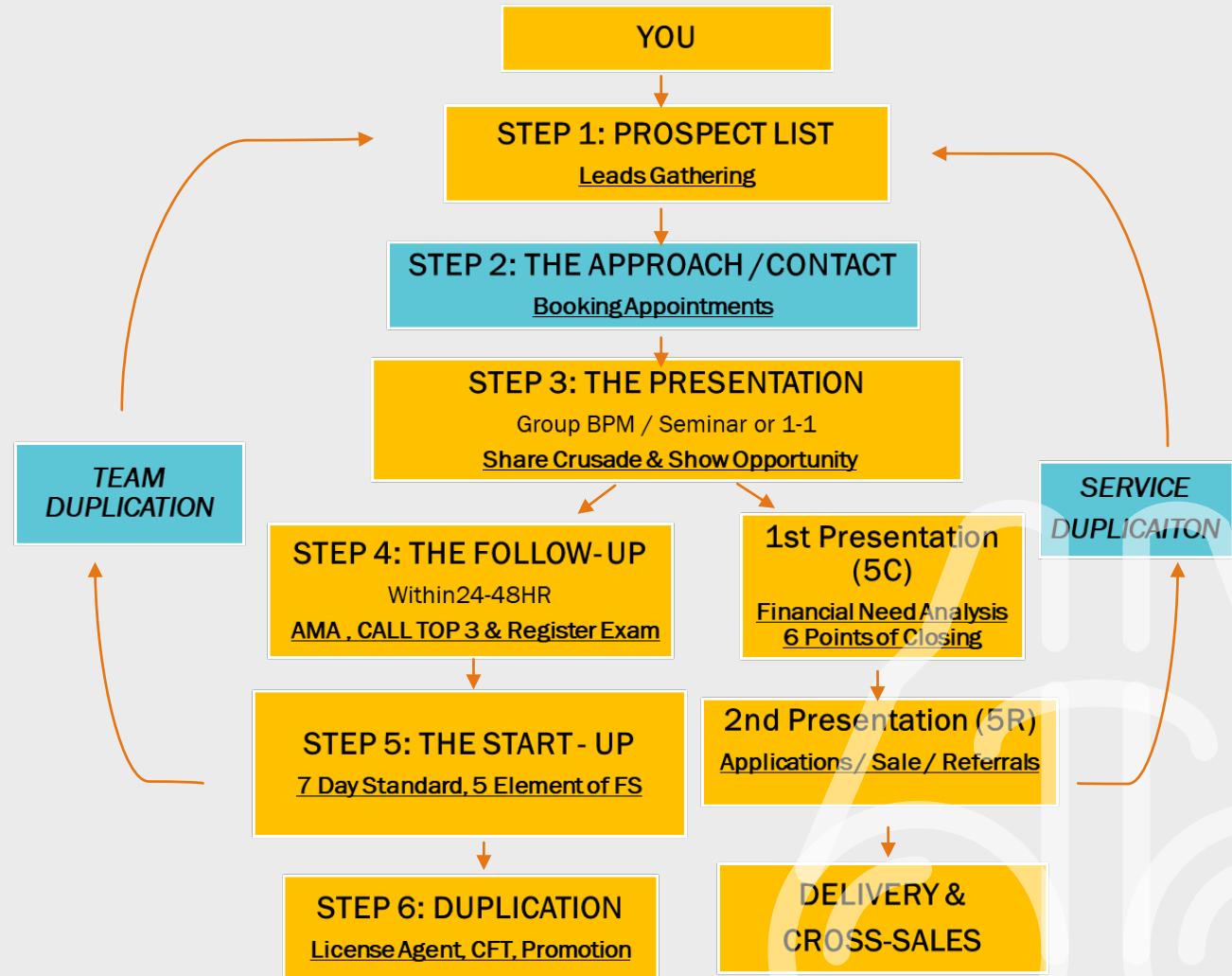
- **Learn the Script**
 - Pass the Phone
 - Edification Script
 - Help me Script
 - Overcome objection
 - BPM Invite Script



- **Champion's Path**
 - 5 Element of Fast Start
 - 7 Day standard



THE BUSINESS FORMAT SYSTEM





STEP 2: THE APPROACH/ CONTACT

**Learn
THE SCRIPTS.**

EDIFICATION SCRIPT
HELP ME SCRIPT (M.A.C.H.O)
BPM INVITE SCRIPT (B.A.D.)

**Make CALLS
WITH TRINER.**

3 Guests to BPM (B.A.D.)
3 Qualified Appointment (M.A.C.H.O.)

**Master
overcome
objection**

ROLL PLAY .
COMPETENCE BUILD CONFIDENT.
PERFECT PREPERATION MAKE PERFECT.

STEP 2: THE APPROACH/ CONTACT

PURPOSE: CONTROLLING THE POINT OF CONTACT. TO EFFECTIVELY CONTACT A PROSPECT AND SET A DATE.

SCENARIO OF DISASTER

- Your **ENTHUSIASM**
- Creates **CURIOSITY**
- They Ask **QUESTIONS**
- You attempt to **ANSWER QUESTIONS**
- You **ANSWER WRONG!!!**
(From incorrect or incomplete information)
- They **JUMP TO CONCLUSIONS**
- They result is **FAILURE!!!**



■ WHAT TO DO

❑ **BE CURIOUS ABOUT THE PROSPECT.**

Find out what things are important to him/her.

Determine the prospect's willingness to have an open mind to a new opportunity.

❑ **SELL THEM YOUR DREAM.**

Don't talk about products! This call is your chance to share why you decided to get involved with WFG. When people hear your goals, it helps spark interest in their goals.

❑ **EXPLAIN BRIEFLY WHO WE ARE AND WHAT WE ARE ABOUT.**

The purpose is an invitation, not a presentation. Keep calls to 3 minutes or less.

❑ **MAKE THE BPM INVITATION & GET A COMMITMENT**

I HR-VISUAL-EXPERTS. Let the prospect know the days and times for the next two BPM

❑ **PUT THEM AT EASE & OVERCOME OBJECTIONS.**

The meeting is to provide them with an introduction to the company simply. If he/she wants to look into it further, you can talk further afterward.



WHO AND HOW CAN WE HELP?

M.A.C.H.O

(Saving \$ -> FNA-> Client)

- Married
- Age : 25 +
- Child
- House
- Occupation

> \$150K Household Income



B.A.D. & S.T.E.A.M.

(Make \$ -> AMA-> Business Partner)

- Business Minded
- Ambitious / Growth Mindset
- Dissatisfied
- **S.T.E.A.M.**
 - Sales
 - Teacher
 - Enthusiastic
 - Ambitious
 - Money Motivated



GOLDEN TRIANGLE

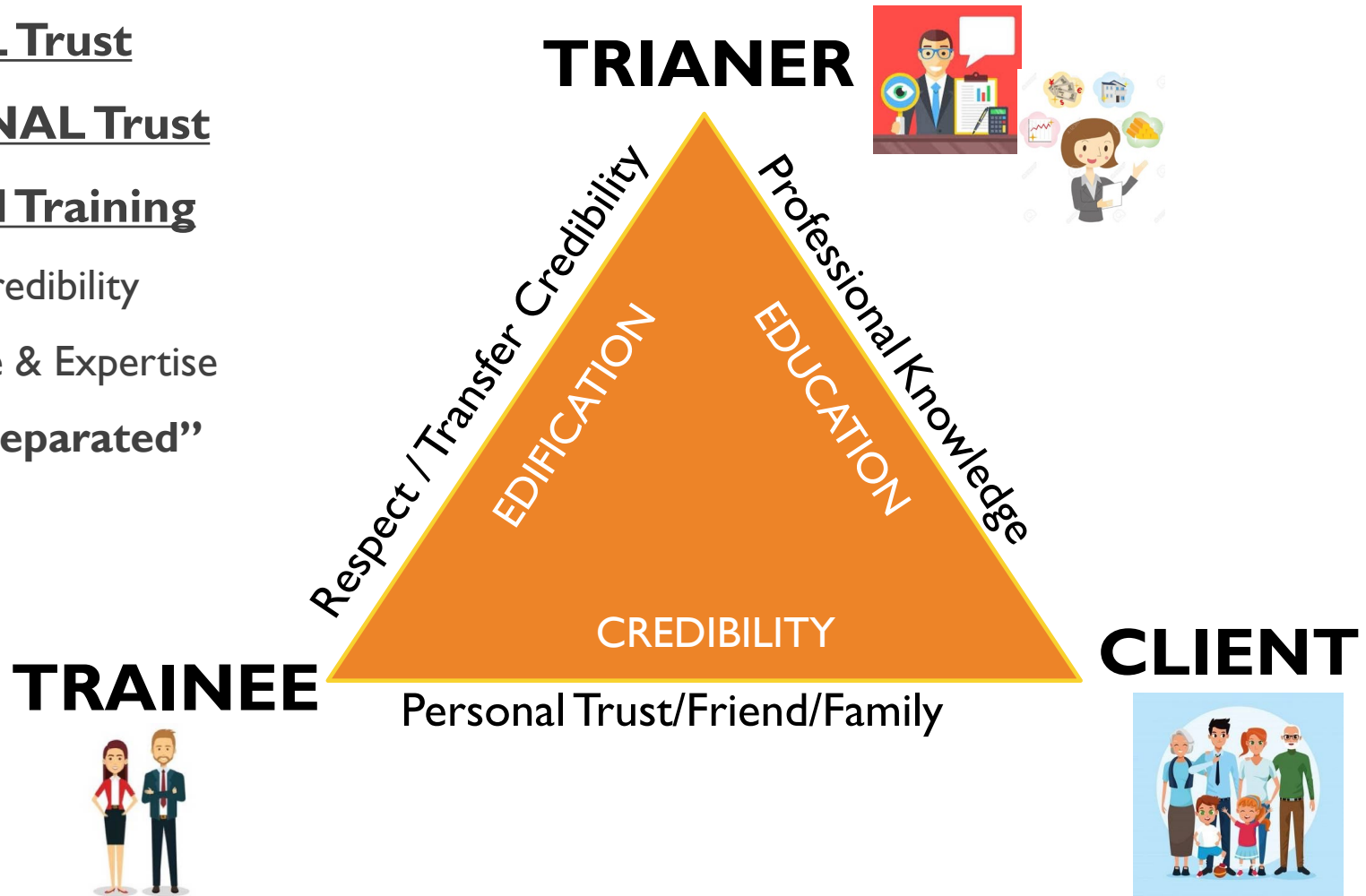
UNLIMITED REFERRALS AND CLIENTS

PERSONAL Trust

+ PROFESSIONAL Trust

= Success Field Training

- Trainee: Trust & Credibility
- Trainer: Knowledge & Expertise
- “Two Roles are Separated”





PASS THE PHONE SCRIPT

TRAINEE:

I don't know if you've heard that I just got started with a financial firm and **my trainer asked me to call you.** His/her name is (trainer name), and he/she is here with me now. **I'm going to pass the phone to him/her.**
{PASS THE PHONE}

TRAINER:

Hi [NAME], how are you? My name is _____. Just like (trainee) said, we are calling together because [trainee] started in our **training program** and we asked him/her who he/she **trust, and respects** and your name was at the top of his/her list. **How is that make you feel?** (Wait for response.)

As part of our training program, (trainee) is required to complete some **training appointments**. This virtual conference is about **45 minutes**, and we'll share with you and [spouse's name] some **concepts of how money work**, then in the future, you can send [trainee] some **REFERRALS**. **Do you think [trainee] has enough credibility for you to help him/her?** (wait for answer)

CLOSE: And since we have you both on the phone, let's find a time that we can all meet online together. **What is your schedule like this week?** Weekday or weekend is better for you? Morning or afternoon? Great, **I will send you a confirmation text with the zoom link for our virtual conference.**

Looking forward meeting with you ___at ___ o'clock!! Please hold on real quick, [trainee] wants to say "Bye."

TRAINEE: **Thanks for supporting me and my training.** We're excited to see you _____.



EDIFICATION SCRIPT

1. Thank [Trainer]
2. Help lots of family in the community.
3. Personally help me in the area of... (family protection, retirement,)
4. Main reason to start this business.
5. Hope [Trainer] can do the same for you and [spouse's name]
6. Thanks [Trainer] again.

TRAINEE:

(Couple's names) Before we start, I wanted to take a minute here and thank (trainer's name) for taking time out of (his/her) busy schedule to be here today to train me.

(Trainer's name) and his/her team have helped lots of family in the community in the past 16 years.

I know I told you when I called that I wanted you to take a look at what I'm doing, but I want you to know something. **I'm very serious about this opportunity.** I will probably be making a career change from (current employer) in the next 3-6 months; the number one reason I am confident is that (trainer's name) and his/ her team. **They did such an excellent job for (spouse) and me on planning our retirement**— and we were so impressed with what this company has done for us that I felt obligated to share this opportunity with you. **I hope he/she can do the same for you and [spouse's name].**

Anyway, I just wanted to thank (trainer's name) for being here. **You are going to like what he/she is going to show you.** I'm just excited that I get to share this time with you. (Trainer's name), I want to turn this over to you.



HELP ME SCRIPT: E.T.H.O.R. (M.A.C.H.O.)

Hi [potential client] this is [trainee] (Make small talk on their family-> career).

I don't know if you've heard, but I recently took a position with a financial firm, and I am **EXCITED**. I'm in their **TRAINING** program, which includes licensing and 5 appointments in the field. My goal is to get my 5 training appointments done THIS week, and I need your **HELP!**

You'll help me out...right? (wait for answer)

I valued your **OPINION**, and was hoping you would support me. It's about 45 minutes, and we'll share some concepts of how money work, then in the future, you can send me some **REFERRALS**. If nothing else, I can get my training out of the way. Sound good? (wait for answer)

CLOSE: Great, so which day this week works best for you and [spouse's name]?

Does Weekday or Weekend work best? (Give them two times to choose from.)

Great, I'll be bringing one of the top trainers from the office with me.

CONFIRM: By the way, [name], I know you are professional in what you do. Can I ask you to respect each other's time? If there is a change in your schedule, can you PLEASE let me know ahead of time? (wait for answer) And we will do the same. Thanks again for your support. See you on ___ at ___ o'clock!



OVERCOME OBJECTION

- **Q: “What is it?”**
- It’s about 35-45 minutes or so, and we’ll show you **some concepts of how money work.** Then maybe in the future, if you know someone or hear anybody talking about it, you can give me a **REFERRAL.** If nothing else, I get my **TRAINING** out of the way. **Sounds good? CLOSE**
- **Q: “What do you do?”**
- I’d love to explain all of it, but I’m still new. Basically, we **help people make and save money with simple financial concepts.** **What financial Concepts are you familiar with?** (wait for an answer) Great, then you will be going to enjoy this meeting. **CLOSE**



OVERCOME OBJECTION

- Q: “Do I have to buy anything?! I already have a finance guy helping me.”
- No worry, it's just for my **TRAINING** /promotion. Then in the future, maybe you can give me **REFERRALS**. **How does that sound? CLOSE**
- Q: “What’s the name of the company?”
- We are **World Financial Group, a Transamerica company**. Have you heard of us before? **Anyway,** we are a marketing company for financial service products. We mainly doing **middle management and marketing** for major companies such as Nationwide, Pacific Life, Prudential, etc. **Have you heard of those companies before? CLOSE**



OVERCOME OBJECTION

- Q: If they keep asking questions
- Listen, I value your OPINION, and in the worst-case scenario, you could send me some **REFERRALS** down the road. That's all. No big deal. **How does that sound? CLOSE**
- or
- Listen, as I said, I just started, and I don't know everything. It would do both you and me no good if I tried to explain it to you over the phone. Whatever questions you have, save them for the presentation, and I'm sure my trainer will answer them. Fair enough? **CLOSE**



BPM INVITE: E.T.H.O.R. (B.A.D- B.P.M.)

Hey [NAME]. How are you doing? (Make small talk **Family-> Career**)

Hey, what do you have going on Tuesday night? (If they said busy, Ask: How about Saturday morning?)

Well, let me tell you why I was calling. I just recently started with a financial firm and I'm **EXCITED** about the position. We have an **open house**, and I would love to have you as my guest. You know I always **respect** your **OPINION**, and I would like it, if you took a look at what we do. Then maybe you can send me some **REFERRALS** down the road. Fair enough?

CLOSE: It starts at 6 pm/9 am and will finish within 45 min. I will send you the zoom link to register ahead of time. At the end of the presentation, you will receive an email feedback survey. Please take a moment to fill it out. Then, I will call you shortly after my training is finished at 7 pm/10 am!

CONFIRM: By the way, [name], I know you are busy, but I can count on you to show up, right? [wait for answer]. If there is a change in your schedule, can you PLEASE let me know ahead of time?[wait for answer]. Thanks again for your support. **Your support is very important for me.**
See you on ___ at ___ o'clock!

CHAMPION'S PATH



Replace a full-time nightmare with a part-time dream!



5 ELEMENTS OF FAST START

7 DAY STANDARD

Complete in First 7 day and receive
a **SPRINT AWARD** and
Recognition as a **20%ER (80-20 Rule)**



1. Register for Course & Exam

(Exam Date)

2. Financial Need Analysis

(Client)

3. Complete Top25 List

(Give Trainer a copy)

4. 3 BPM Guests - B.A.D.* and 3 Field Trainings - M.A.C.H.O.*

(Complete 1st appointment)

5. Meeting Commitment

(BPM, Bootcamp, Next Event)

*B.A.D.: Business Minded/ Ambitious/ Dissatisfied

*M.A.C.H.O.: Married/ Age/ Child/Homeowner/ Occupation: combined >\$150K

THANK YOU

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