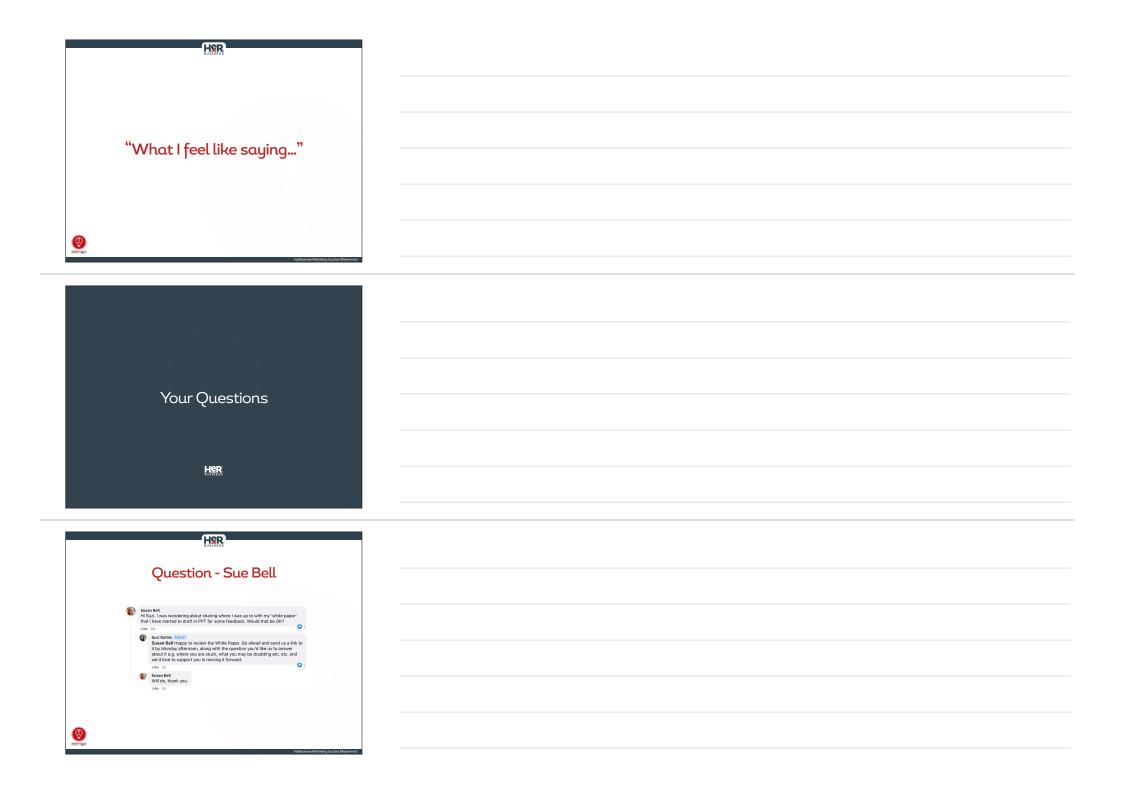
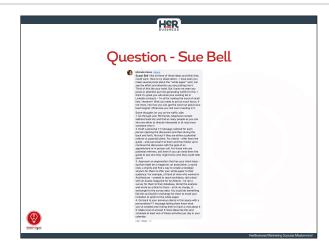
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| Q&A Session 27 October 2021 | |
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| What's Coming Up | |
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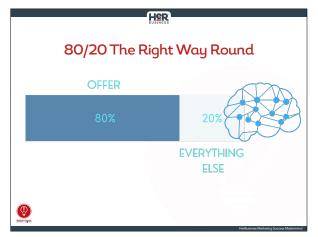




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HER Some thoughts for you on the traffic side: 1. Go through your FB friends, telephone contact address book etc and find as many people as you can who are either a) directly interested or b) may know someone who is 2. Draft a personal 1:1 message, tailored for each person opening the discussion and then during the back and forth, find out if they are either a potential referrer or potential client. For clients - offer them the guide - and just email it to them and then follow up to continue the discussion with the goal of an appointment or in person call. For those who are potential referrers, ask them if you can send them the guide to see who they might know who they could refer you to 3. Approach an organisation that has your client base eg that might be a magazine, an association, a social club, a charity and find a way to create a strategic win/win for them to offer your white paper to their audience. For example, a friend of mine who worked in Architecture - wanted to reach architects, did a deal with an Aussie magazine for Architects - he ran a survey for them to their database, did all the analysis and wrote an article for them - all at no charge, in exchange for the survey data. You could do something like this and build in exchange for them to email your 4. Go back to your previous clients in this space with a personalised 1:1 message letting them know what you've created and inviting them to have a chat about it 5. Make a list of at least 5 more ideas like this and schedule at least one of these activities per day in your

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| Take this challenge: | ı ——— | |
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| Do you think of this generation as 'retirees' or 'baby boomers'? Do you think of this generation as out of touch with technology? Do you think of the generation as out of touch with technology? If you do any of these, I can help. Engaging with and communicating better with customers are the keys to growth for financial organisations. This means understanding customer segments beyond simplistic stereotypes, to empathise with people as they really are. In this Insights Paper I share some of the key insights from our work with the baby boomer generation. Red on! | | |
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| Think beyond the 'baby boomer label' People argue about when the baby boom actually was but i baby boom lasted roughly between 1949 and 1965. In 2021 Boomers are aged between 56 and 72. | |
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| But bear in mind that the Baby Boom in the UK and parts o shorter. Roughly a third of people in this age group may no themselves as Baby Boomers at all. | |
| Some were teenage hippies, some were teenage Madonna Only about a third of Aussie baby boomers were teenagers Some Baby Boomers were born during the sixties, coming of 1980's. | during the sixties. |
| TIP: Avoid the term 'Baby Boomer' because it disguises decades | s of diversity and very different cultural reference |

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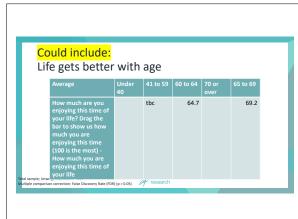






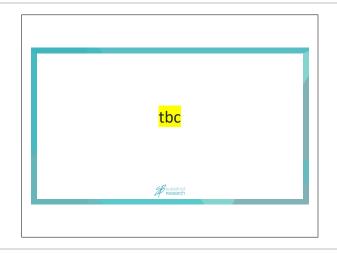








| ould include – ageism in the workpla lave you ever experienced any of the | | |
|--|------|--------|
| | Male | Female |
| Feeling too old at work | 11% | 15 |
| Looked down on at work because of my age | 14% | 11 |
| Appreciated at work because of my age | 13% | 11 |
| Discrimination based on age at work - e.g not getting a promotion | 12% | 12 |
| Something else? | 5% | 3 |
| None of these | 62% | 63 |
| Don't know | 1% | 4 |
| Susanbeil research | | |



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White Paper

Avoid "you're wrong" / "younger marketers don't understand"

Myths

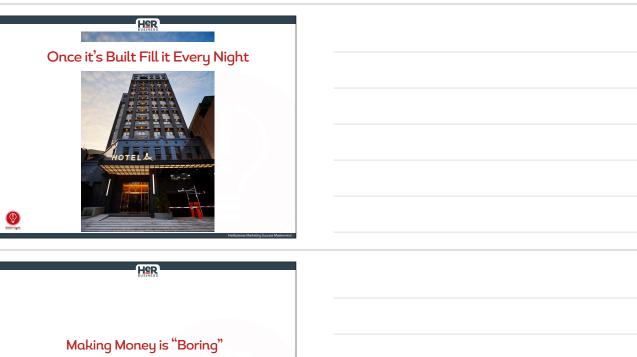
Speak more to your avatar's issues eg:

Context: Highly competitive marketplace. A lot of legislated change expected in 2022. It is a 'growth' market.

Paint the OPPORTUNITY of having this knowledge

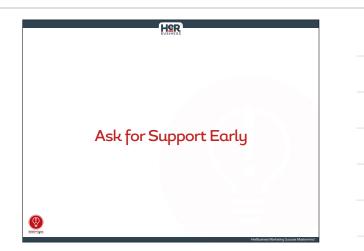
• CTA - what's the very next step?

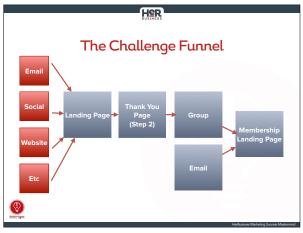






| | is a best practice for when to let them in). I was intending on having an email sequence that started from sign up and then a preparation one up to a week before, a few days before and the day before it started, then each day of the challenge. Doors open to the membership will be from the Thursday night of the challenge for 4 days. I was planning on going live in the group each evening to motivate and cover a new profilem each day. I was also going to have scheduled | |
|---------|--|-------------|
| 2 | posts for each day of the challenge to encourage participation by having them post photos of their squares. The group will be closed after the challenge ends - probably the same day as doors close to the membership. | |
| 3. | Do I need to gave prizes? I had thoughts of mimicking the membership van draw at the end of the challenge - which is a random draw for participants to care that who them a voucher for yam that is equivalent to 2 months membership - or should here beind or of the challenge and van times a bows entry into the draw of the participant of the should be represented by the should be represented by the should be represented by the should be represented by the represented by the r | I. 5. 6. |
| \odot | I know - lots of questions, but they don't all have to be answered specifically. I'm really just looking for guidance for what I should do to get them to participate and convert. |). 0. |















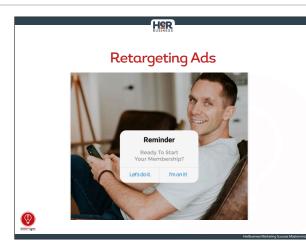


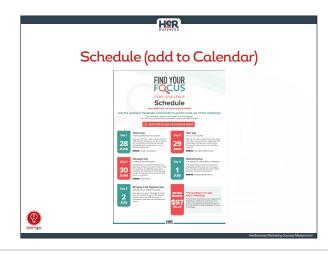




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| CLAIM MY FREE PLACE |
| Phinacy Policy: We hate spam and promise to keep your email address safe |





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| | Inside the Group |
| | • Guides |
| | Start Here |
| | Daily Lesson/Worksheets |
| | About the Membership |
| | About You |
| | Change the covers daily (notifies the members) |
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Seeding the Membership

No Surprises

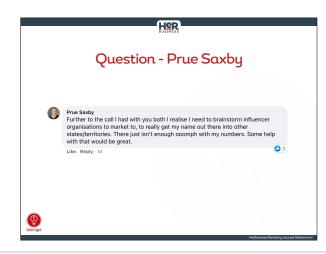
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Add to Guides

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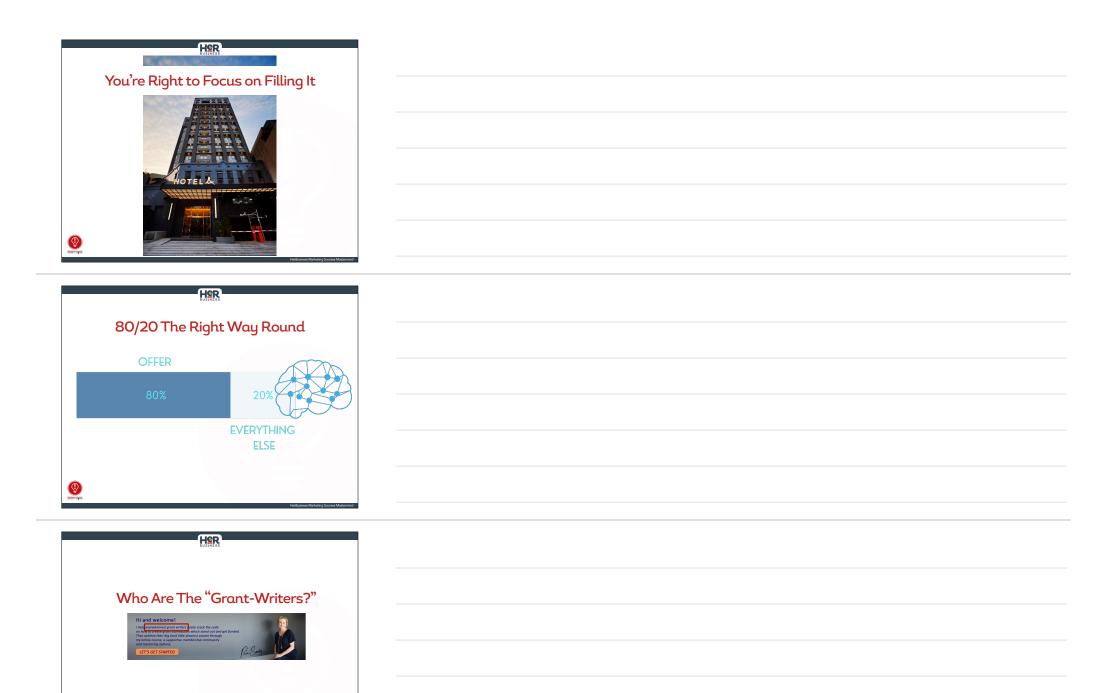












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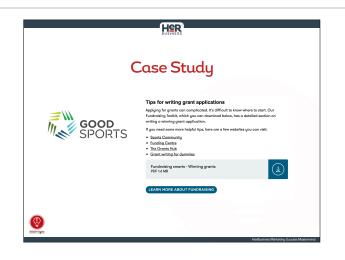




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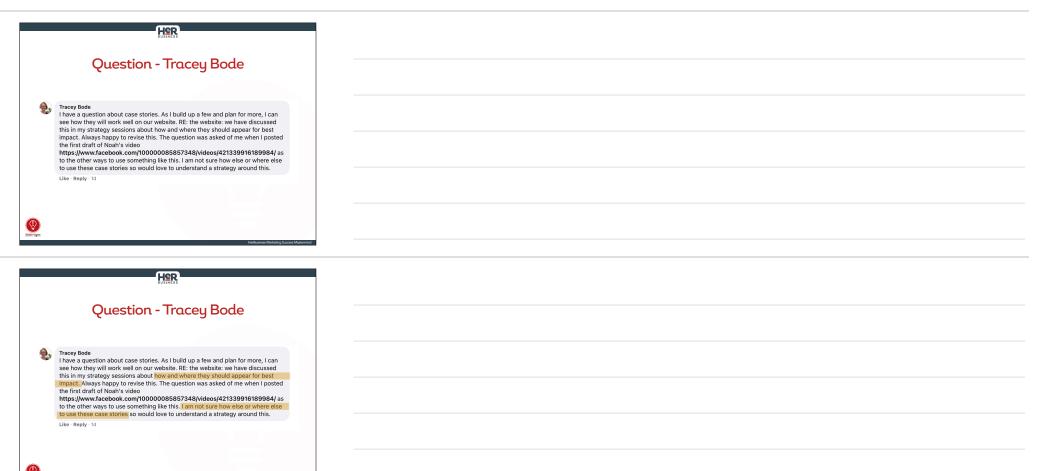


HER Intentional Selling

| Shift Mental Attitude From: | Shift Mental Attitude To: | | |
|----------------------------------|-------------------------------------|--|--|
| Activity focused | Results focused | | |
| Pitching products & solutions | Solving client problems | | |
| Focus of attention on self | Focus of attention on client | | |
| Limiting assumptions and beliefs | Resourceful assumptions and beliefs | | |
| Problem focused | Solution focused | | |
| Risk averse | Courage to take appropriate risks | | |
| Blame mentality | Personal responsibility | | |

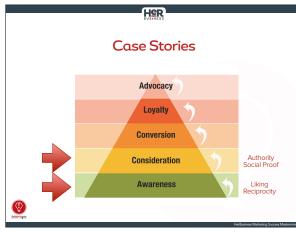
Credit: Tanja Parsley, Partners in Performance

| Strat | onic Alliance | Success Fro | mework - 9 | Summoru |
|---|--|--|--|--|
| Strategy | Identify Partner | Identify | Outreach | Making a |
| Mountain • What • Who • How Goals • Paid • Paid • Reciprocal • Joint Venture • Contra/Service Exchange • Level Shering | Brainstorm • What • All and • All and • Means • Mean | WIFT • What-sell more • What-sell more • What-sell more • What • Date • Date • List vice • Lativite • Lat | Kebreaker • Natival Zdelegue • Cois Lend Trust Building Presenting Your Value • Seek first for undestand • WET Getting to Synergy | Sarter Why Wh Start Smill & Easy Low Stakes Financials Rese & Responsibilities Who Owns What Document - Emst - Afflade Agreement |
| Launch & | Review / | Manage 🛁 | Ongoing | Scale |
| Manage | Remunerate | Relationship | | |
| Test Pilot before Scale Agree Comms • Report • Contsct People • Toutleshooting • Who | Be Prompt Get Relevant Payment Details Use Tech Where Possible Benuses Celebrate | Loyalty • Stay in touch • Onto the "forweather friend" Planned Spontanelty • Treat like a client • Mistanes • Anniversaries • "Just Baccuse" | | |
| Maintain Win / Win | Celebrate | Share Wins Client successes | | |





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| Next Workshop (3 Days) - 24 - 26 November (includes a PLANNING DAY!) will be Virtual | |
| NEW Masterminders! | |
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"What I feel like saying..."