

# Audio Interpretation Channels

#MDRT2016

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國語頻道

Mandarin Channel



# George D. Goulet, TEP, CFSB

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

MDRT®  
ANNUAL MEETING  
**2016**  
JUNE 12-15  
VANCOUVER

**“I’m not a teacher, only a fellow-traveler of whom you asked the way. I pointed ahead – ahead of myself as well as you.”**

**– George Bernard Shaw**

# **Your Next Level of Success**

**To reach MDRT's Top of the Table you will have to do 6 times the MDRT production requirement.**

# How are we going to do this?

# Ways To Increase Our Production Level

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

# What Business Activities, Tactics and Strategies Would Support Us To:

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

# Business Activities, Tactics and Strategies

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



# You already have the “know how.”



# Let's Check In

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

# Let's Check In

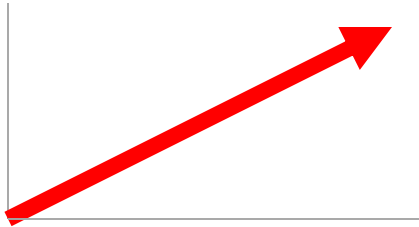
2. We know that in order to do this we will have to either:
  1. Increase the number of sales we make.
  2. Increase the size of sales we make.
  3. Some combination of the two.

# Let's Check In

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

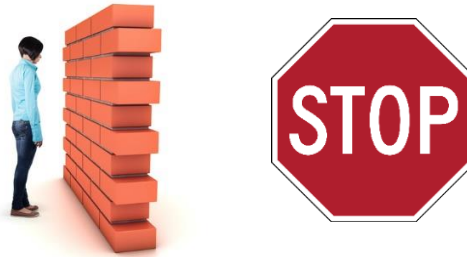
# Consistency

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?



# 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?



# 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?

# 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 have enough energy.”
- “Etc.”



# Barriers Exercise

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

# 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?



# 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?



# What happened? What changed?

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

# Your Thinking Changed



# Internal Evaluation:

Want To



Need To

1. **Circumstances** - You had a good enough reason to raise your personal standards/expectations.
2. **Capability** - You believed it is in the realm of possibility that you could do it.
3. **Commitment** - You were willing to take the necessary actions to succeed.

**The result is “Personal 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.”

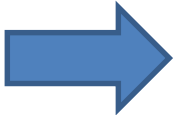
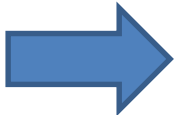
**Seek  
Pleasure**





**Avoid  
Pain**



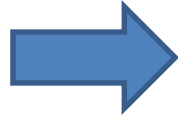
# Getting to The Top of the Table

Change of Thinking  Personal Motivation  Action

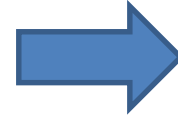
No Change of Thinking  No Change in Personal Motivation  No Change in Action

# Moving From Our Current Level of Success to Our Next Level of Success

Change of  
Thinking



Personal  
Motivation



Action



**Laura**



**Susan**

# Moving From Our Current Level of Success to Our Next Level of Success



**Laura**

Wanted to lose 40+ Lbs.

# Moving From Our Current Level of Success to Our Next Level of Success



**Susan**

Wanted to quite smoking.

# Moving From Our Current Level of Success to Our Next Level of Success



**Laura**

Changed her thinking which gave her personal motivation which resulted in her taking the necessary actions to succeed.

# Moving From Our Current Level of Success to Our Next Level of Success



## **Susan**

Did not change her thinking which did not give her personal motivation which resulted in her not taking the necessary actions to succeed.

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

The 7 Strategies are about ways in which we can go about changing our thinking so that we have the personal motivation to take the necessary actions in order to reach our next level of success.

# 1st Strategy

## Set Big Lifetime Goals



# Set Big Lifetime Goals

- When we set meaningful and inspirational lifetime goals, the process of doing this changes our thinking by tapping into our beliefs about what is possible for us to achieve during our lifetime.
- Lifetime goals bring passion, excitement, enthusiasm, confidence and energy into our daily experience which we then carry with us into the business arena.

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

# Set Big Lifetime Goals

## Example 1

### **Traditional Goal:**

Travel to Spain within the next 3 years.

### **Lifetime Goal:**

Travel to 50 countries during my lifetime.

# 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.

# Set Big Lifetime Goals

## Example 2

### **Traditional Goal:**

Lose 10 pounds.

### **Lifetime Goal:**

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

# 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.

# 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 a Lifetime Goal with your 1 year breakdown target.

# 1<sup>st</sup> Strategy: Set Big Lifetime Goals

Your clients don't purchase your products they purchase you.



## 2nd Strategy

# Alter Your Bio-Chemistry

# 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](http://webmd.com)**

# 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.

# 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.

# Fuel

## Unhealthy Fuel:

- Unhealthy Fats
- Sugar
- Salt
- Artificial Ingredients
- Artificial Sweeteners
- Caffeine
- Soda
- Alcohol

## Healthy Fuel:

- Healthy fats
- Fruits
- Vegetables
- Whole grains
- Seeds and nuts
- Water

# 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](http://hbr.org))**

# 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](http://businessinsider.com) and [forbes.com](http://forbes.com)**

## 2<sup>nd</sup> Strategy: Alter Your Bio-Chemistry

- 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.



## 2<sup>nd</sup> Strategy: Alter Your Bio-Chemistry

Again, your clients don't purchase your products they purchase you.

## **3rd Strategy**

# **Master How You Allocate Your Time**

# 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.

# 1. Recognize and Place a Higher Value on Your Time

What is the value of your production time?

# 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

# 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?

# 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.

# 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.



# 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.

# 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.

## **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.

## **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”).

## 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](http://lifehack.org)**

## 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](http://lifehack.org)**

### 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.

### 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**.



# 3<sup>rd</sup> Strategy: Master How You Allocate Your Time Summary

- To increase our production we must consistently make good decisions about how we allocate our time in order to maximize our time for revenue generating activities.
- Mastering how you allocate your time is a never ending journey.

“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**

## **4th Strategy**

# **Identify and Conquer Your Barriers**

# 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?

# Identify and Conquer Your Barriers

## 4 Steps

### 1. **Identify:** Identify your barriers.

*Example: “I am overwhelmed with the time demands of dealing with client service issues which limits my time to develop new Business.”*

# Identify and Conquer Your Barriers

## 4 Steps

- 2. Accountability:** Identify what you bring to this barrier or your part in this barrier existing.

*Example: “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.”*

# Identify and Conquer Your Barriers

## 4 Steps

- 3. Reframe:** Reframe your barrier into a “challenge to be solved”.

*Example: “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.”*

# Identify and Conquer Your Barriers

## 4 Steps

4. **Overcome:** Identify all of the obstacles to your “challenge to be solved” and your strategies for dealing with your obstacles.



# Identify and Conquer Your Barriers

## 4 Steps Example

**Challenge to be solved:** “I need to figure out how to deal with on-going client service issues so that I can focus on developing new business”.

### **Obstacles:**

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

# Identify and Conquer Your Barriers

## 4 Steps Example

### Strategies:

1. Ask my assistant to do quarterly follow-up calls with each of my clients,
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.

## 4<sup>th</sup> Strategy: Identify and Conquer Your Barriers

Revisit the barriers you identified earlier in the presentation and use this approach.

When your thinking changes, everything changes.

## 4<sup>th</sup> Strategy: Identify and Conquer Your Barriers

“The problem is never the problem. The problem is not knowing how to think about the problem.”

“All progress starts with telling the truth.”



– Dan Sullivan, Strategic Coach

## 5th Strategy

# **SPECIALIZE**

# 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.

# ABC Benefits

**ACCEPTING ANY AND ALL  
NEW CLIENTS NOW!**



**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.

# 4 Ways to Specialize

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



# 4 Ways to Specialize

1. Specialize in only one or two product offerings.

# 4 Ways to Specialize

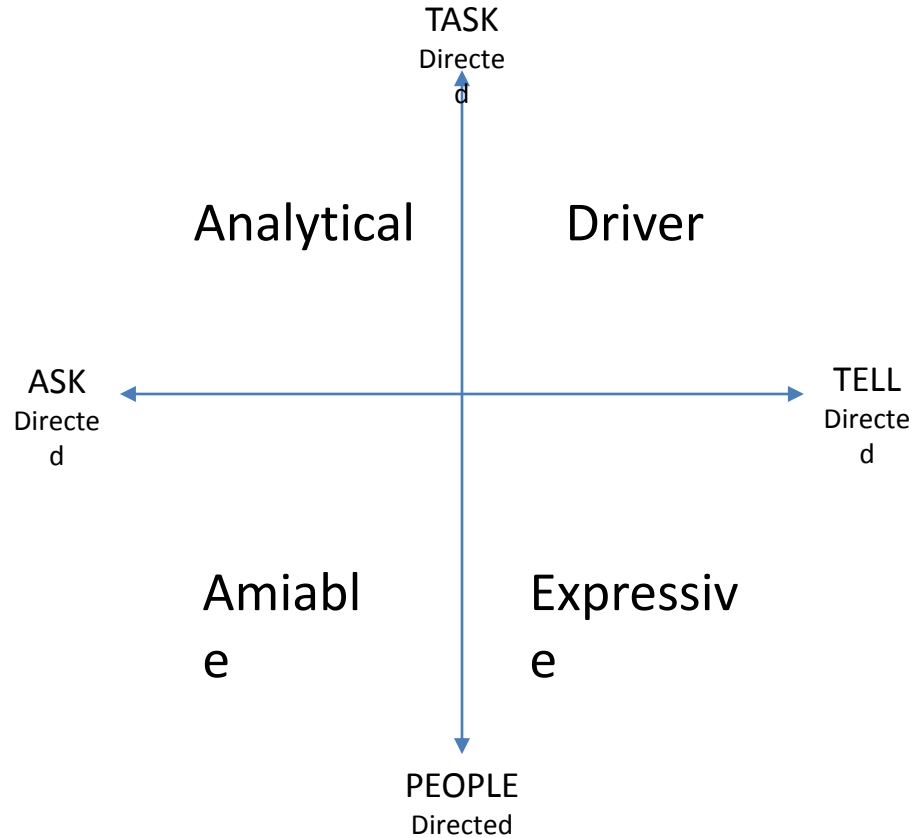
2. Specialize in only one market segment.

# 4 Ways to Specialize

3. Specialize with only one demographic group.

# 4 Ways to Specialize

4. Specialize in only one social style.



# 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?

## 5<sup>th</sup> Strategy: SPECIALIZE

- You will create a niche business monopoly in the market in which you specialize.
- Specialization is the most efficient approach to increasing your production level in order to reach your next level of success.

## 6th Strategy

# Cultivate More Ideal Clients



# Our Approach

We use a combination of LinkedIn and a direct marketing system to cultivate **Ideal Clients** that in my office we refer to as our “**Million Dollar Marketing System**”.



# Our Million Dollar Marketing System

## 4 Steps

1. We use my LinkedIn profile to build a **LinkedIn Prospect Bank** of Ideal Prospects,
2. We created an **Introductory Brochure** that can be personalized to each of our Ideal Prospects,
3. We consistently mail or hand deliver 24 **Introductory Brochures** to our Ideal Prospects every week,
4. We use a **Sweet Approach** to get gatekeepers to assist us in connecting with our Ideal Prospects.



## Step 1: We use my LinkedIn profile to build a LinkedIn Prospect Bank of Ideal Prospects

- We first identified the **Ideal Prospect** based on our chosen market segment, demographics and social style.
- Cleaned up my LinkedIn network.
- Selectively invited clients and contacts to join my LinkedIn network.



## Step 1: We use my LinkedIn profile to build a LinkedIn Prospect Bank of Ideal Prospects

- In my LinkedIn under **“My Network”** we went to **“People You May Know”** and invited everyone who meets our definition of an **Ideal Prospect**.
- As **Ideal Prospects** accept our invitations, my **“People You May Know”** is populated with their LinkedIn contacts some of whom will also meet our definition of an **Ideal Prospect**. This process continually repeats itself.
- LinkedIn Premium can help this process.



## Step 1: We use my LinkedIn profile to build a LinkedIn Prospect Bank of Ideal Prospects

- Once an **Ideal Prospect** is in my prospect bank they stay in until they either specifically communicate to me, or take actions that communicate to me, that they will not be doing business with me or they die.
- Every time one of these events occur we add a new **Ideal Prospect** to the prospect bank so that we always maintain at least 600 of my **Ideal Prospects**.



## Step 2: We created an Introductory Brochure that can be personalized to each of our Ideal Prospects

- Our brochure uses a cover letter that we can personalize to each of our **Ideal Prospects**. We use a micro-print shop to print and fold each brochure.
- The inside of our brochure has a 3 point summary of the services we offer on one page and references on the other.
- The back cover provides a visual representation of what we will deliver to our **Ideal Prospects**.

## Step 2: We created an Introductory Brochure that can be personalized to each of 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. Our brochure includes credibility logos that our clients understand.



February 15, 2016

ABC Enterprises Inc.  
123 Any Street  
Calgary, AB T0L 0L0

Attention: John Smith

Dear John,

As a specialist working with business owners I know that it can be extremely challenging to have every important detail of your business taken care of and up to date.

The problem is it's difficult to find the time to do everything.

I can help you take care of one of these important details and I will do an exceptional job of it. Please take a minute to review this brochure to discover how I can help you.

Sincerely,



George D. Goulet, TEP, FLMI, RFC, CFSB  
President

Access Health Benefits Ltd.  
400, 909 – 17th Avenue SW  
Calgary, AB T2T 0A4  
Bus: (403) 264-8020  
Cell: (403) 540-4644  
Email: [george@accessbenefits.ca](mailto:george@accessbenefits.ca)  
Web: [www.accessbenefits.ca](http://www.accessbenefits.ca)

You Deserve Better – We Deliver It™



## What I Can Do For You



For over 25 years I have helped business owners to make sure that their keyperson life and health insurance coverage is in place, up to date and organized. I would like to do the same for you. Here is what you can expect me to do for you:



### I will save you money on your keyperson insurance rates

- I will show you how to save up to 40% a year on your rates.
- If your insurance company has lowered its rates for new policyholders but hasn't lowered them for you, a very common occurrence, I will help you to get those lower rates.
- If you have been overpaying I will also work to get you a refund of your overpayment. The largest refund I have obtained for a client is \$119,000 (yes, you read that correctly).



### I will show you how to transfer money out of your company tax free

- Your keyperson life and health insurance coverage can be used to transfer money out of your company tax free. However, you may not be fully realizing this benefit if your insurance advisor does not have the necessary expertise.
- I am one of the few qualified advisors who does have the expertise to work with you and your accountant to show you how to structure this properly to realize the tax advantages available to you.



### I will correct common errors that could be costly to you and your family

- When I first do a keyperson insurance review for a business owner, I routinely find outdated beneficiary designations. The most common being former spouses and business partners. You wouldn't want the wrong person receiving your insurance proceeds, would you?

### I Am Here To Help

Just call or text on my cell at (403) 540-4644 or send me a quick email to [george@accessbenefits.ca](mailto:george@accessbenefits.ca) to arrange an introductory meeting so you can decide if I am the right advisor for you.

## What My Clients Have Said About Me



"During the past 12 years George has saved us thousands of dollars a year on our rates. He also met with our accountant to outline how our keyperson insurance coverage could be used to transfer earnings out of our company tax free. I highly recommend George."

**Marlene Coffey**  
President, MicroWatt Control Devices Ltd.

*MicroWatt has a 30-year history of being a leading manufacturer and distributor of fire and gas detection products in Canada.*

"George helped us to get lower rates with our insurance company and also negotiated a refund of 6 year's worth of overpayments. Fortunately, we got a second opinion from George. He's provided outstanding service to us over the past 15 years."

**Don Bietz**  
Chief Operating Officer, ECL Group of Companies Ltd.  
Past President of the Alberta Motor Transport Association (AMTA)

*Economy Carriers was established in 1947. The company became one of the Top 100 Privately Held Companies in Calgary and was recognized for 7 years by The Financial Post as one of The 50 Best Managed Companies in Canada. In 2012 ECL Group sold its interest in Economy Carriers to Westcan Bulk Transport.*



"George has helped us to save close to \$100,000 over a 5-year period. He also worked with our accountant to help us transfer earnings out of our company, tax free, using our keyperson insurance plans. George is an exceptional insurance advisor and I highly recommend him."

**Bruce Watson**  
Founder, Alberta Janitorial Ltd.

*Alberta Janitorial Ltd. was established in 1975 and has grown to become one of the top commercial cleaning services company's in Alberta.*

"George was able to immediately save us over \$10,000 a year. This has now amounted to an improvement to my bottom line of over \$70,000. George was recommended to me and I recommend him to you."

**Jim Nealon, President,**  
New West Electric Ltd.

*New West Electric Ltd. has provided commercial and residential electrical services in Calgary for over 30 years and has an outstanding reputation for its quality work.*



"George met with my accountant to outline how I could do a tax free transfer of earnings out of my company through my existing keyperson insurance coverage. George handled all the details for me. I encourage you to take advantage of his expertise."

**Glenn Bauer**  
Past President, Ventures West Transport LP

*Ventures West Transport LP based out of Fort Saskatchewan, Alberta is a leading transporter of petroleum products in Alberta, Yukon and the NWT.*

## The End Result

I have found that when first working with many of my clients that they were not entirely sure what type of coverage they had, how much they were paying for it and they did not know for sure if their rates or coverage would change or expire at some point in the future.

If you hire me as your insurance advisor, the end result is that all of your life and health insurance coverage will be properly in place, up to date and organized in a directory with a one page master summary. All the details will be taken care of and you will know what coverage you have and where to find it.



Plan Name	Amount	Start Date	End Date	Company
Access Health Plan	\$100,000	2010-01-01	2010-12-31	Access Health
Access Health Plan	\$100,000	2011-01-01	2011-12-31	Access Health
Access Health Plan	\$100,000	2012-01-01	2012-12-31	Access Health
Access Health Plan	\$100,000	2013-01-01	2013-12-31	Access Health
Access Health Plan	\$100,000	2014-01-01	2014-12-31	Access Health
Access Health Plan	\$100,000	2015-01-01	2015-12-31	Access Health
Access Health Plan	\$100,000	2016-01-01	2016-12-31	Access Health
Access Health Plan	\$100,000	2017-01-01	2017-12-31	Access Health
Access Health Plan	\$100,000	2018-01-01	2018-12-31	Access Health
Access Health Plan	\$100,000	2019-01-01	2019-12-31	Access Health
Access Health Plan	\$100,000	2020-01-01	2020-12-31	Access Health

## What It Will Cost For Me To Save You Money

I do not charge a fee for an initial consultation. If you choose to hire me, my fee is 20% of any first year premium savings and/or premium refund that I am able to negotiate for you (your net savings is 80% of the savings I negotiate for you).

## Let's Get Started

I would welcome the opportunity to go to work for you. To arrange an introductory meeting, call or text me on my cell at (403) 540-4644 or send me a quick email to [george@accessbenefits.ca](mailto:george@accessbenefits.ca).

I look forward to the opportunity of meeting you in person. Have a great day.

George Goulet, TEP, FLMI, RFC, CFSB  
President  
Access Health Benefits Ltd.

To discover more visit: [www.accessbenefits.ca](http://www.accessbenefits.ca)



Access Health is a proud member of:



## Step 2: We created an Introductory Brochure that can be personalized to each of our Ideal Prospects

- We have found that our **Introductory 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.

### **Step 3: We consistently mail or hand deliver 24 Introductory Brochures to our Ideal Prospects every week**

- We re-mail on a 2 month cycle.
- When doing a re-mail we typically do a variation of the note written on the cover page.

## Step 4: We use a “Sweet Approach” to get gatekeepers to assist us in connecting with our Ideal Prospects

- After sending 2 **Introductory Brochures** to an **Ideal Prospect** if we still have not heard from them we identify who their gatekeeper is and send the 3<sup>rd</sup> **Introductory Brochure** through them along with a box of chocolates.

## Step 4: We use a “Sweet Approach” to get gatekeepers to assist us in connecting with our Ideal Prospects

- When sending a **Introductory 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.

# Our Million Dollar Marketing System

It has been our experience over a 25 year period using variations of our **“Million Dollar Marketing System”** that, sending approximately 100 brochures monthly, we have consistently maintained a **3%** new **Ideal Client** development rate.



# Ideal Prospect Text Referral System

1. Ask your **Ideal Clients and Prospects** to add you in or to update your contact information in their smartphone.
2. Give them details on who the first point of contact is on your support team.

# Ideal Prospect Text Referral System

3. Send them a text message with a summary of your **Ideal Prospect** Introductory Details. Include:
  1. The type of people you want them to introduce you to (age range and profession)
  2. How to use text messaging to introduce you
4. Ask them to copy and paste your text message into the notes of your contact details in their smartphone.

# Ideal Prospect Text Referral System

## Introductory Details (Example)

- Introduce business owners to George who are 45-65 years of age and who run trucking, construction, or mechanical service companies such as plumbing and electrical.
- Introduce business owners to George by sending a joint text message to both my business owner contact and to George. Copy and paste the message following and edit as necessary:

# Ideal Prospect Text Referral System

***Hi [Business Owner] and George, I am sending this text to both of you to introduce you two to one another. [Business Owner], George has been my insurance adviser for several years and has done a great job for me. I have no idea if he can help you or not, but he is a great guy who I think you would enjoy meeting and perhaps getting out to play some golf with. I will leave it in both your hands to connect. All the best, hope to see both of you soon. Bob Client.***

## 6<sup>th</sup> Strategy: Cultivate More Ideal Clients

- 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.

## **7th Strategy**

# **Surround Yourself with an Exceptional Team**

# 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.

# 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.



# Surround Yourself with an Exceptional Team

Hiring people to work with you should never be seen as a business expense but rather as an investment.

# 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 you should expect to double your investment in the first year.

## 3 Critical Team Members

- Personal Assistant.
- File Preparation Specialist.
- Marketing Coordinator.

# What do Wayne Gretzky, Michael Jordan, Tom Brady and Jason Day all have in common?



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

## **7<sup>th</sup> Strategy: Surround Yourself with an Exceptional Team**

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 to support our efforts.

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

- We started by establishing that we all want to reach the Top of the Table sales production level.

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

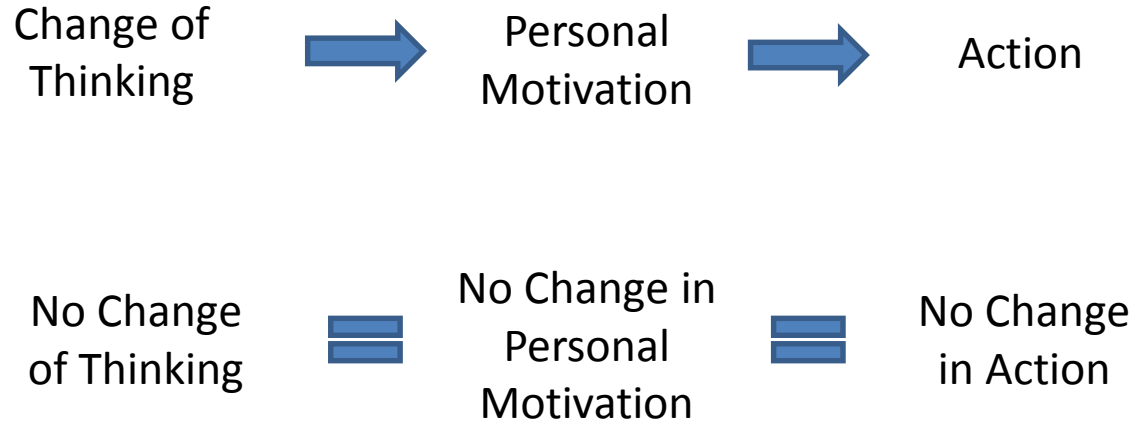
- We then talked about how in order to increase our current level of production we would have to either:
  1. Increase the number of sales we make.
  2. Increase the size of sales we make.
  3. Some combination of the two.



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

- 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 that we would be able to deal with our barriers.

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



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

We then transitioned into the 7 Strategies.

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

## 1<sup>st</sup> Strategy: “Set Big Lifetime Goals”

- We talked about how Big Lifetime Goals changes our thinking by tapping into our beliefs about what is possible for us to achieve during our lifetime.
- We discussed how Big Lifetime Goals bring passion, excitement, enthusiasm, confidence and energy into our daily experience that we bring into the business arena.

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

## **2<sup>nd</sup> Strategy: “Alter Your Bio-Chemistry”**

- We talked about the physiological and psychological benefits of exercise, healthy fuel and meditation-mindfulness and how this can give us a competitive advantage when we show up in the business arena.

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

## 3<sup>rd</sup> Strategy: “Master 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.

**“Carpe-Diem. Seize the day...Make your lives extraordinary.”**

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

## 4<sup>th</sup> Strategy: “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.

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

## 5<sup>th</sup> Strategy: "SPECIALIZE"

- |                        |                 |
|------------------------|-----------------|
| 1. Product Offering    | 3. Demographics |
| 2. Market Segmentation | 4. 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.



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

## 6<sup>th</sup> Strategy: “Cultivate More Ideal Clients”

- I outlined how we have had success using LinkedIn and an Introductory Brochure to approach **Ideal Prospects**.
- We also talked about a system for your **Ideal Clients and Prospects** to introduce you to **Ideal Prospects** using text messaging.

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

## **7<sup>th</sup> Strategy: “Surround Yourself with an Exceptional Team”**

- We discussed how in order to increase our production level we must harness human resources.
- We also discussed that all top performers have coaches to help them maximize their performance.

**We all have one life to live.**

“The quality of a person’s life is in direct proportion to their excellence, regardless of their chosen field of endeavor.”



– **Vince Lombardi**

Green Bay Packers Coach

Winner of the first two Super Bowls.

# Warren MacDonald



“The way to get started is to quit talking and begin doing.”



– **Walt Disney**

**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.**