



2016 MDRT Annual Meeting e-Handout Material

Title: Prospecting Your Way to the Top

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Presentation Date: Tuesday, June 14, 2016

Presentation Time: 8:30 - 9:30 a.m.

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Slide 4

50 LIVES/YEAR
FOR A SUCCESSFUL
PRODUCER

Slide 5

MINIMUM OF
100 LIVES
PER YEAR TO SURVIVE
IN 1983

Slide 6

LIVES / YEAR
90-100
Average TOT
300
Lives / Year

Slide 7

Then:

The Week Of May 10

N

O

12

11

10

9

8

7

6

5

4

3

2

1

Slide 8

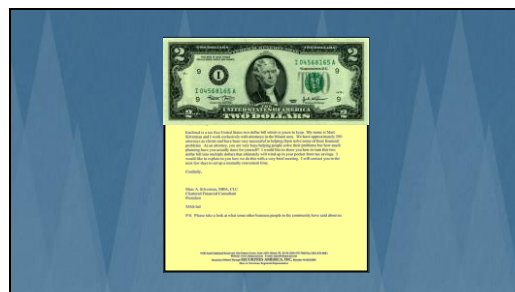
NOW:

20 Appointments per week
Approximately 1,200 per year
300+ lives per year
and
no phone calls

HOW?

[illegible]

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Slide 10



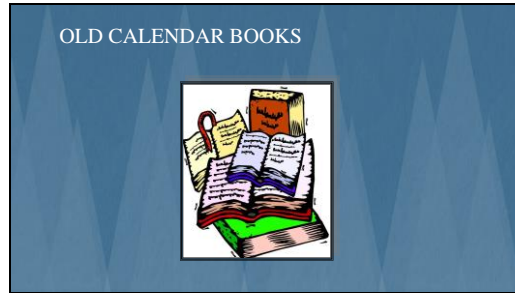
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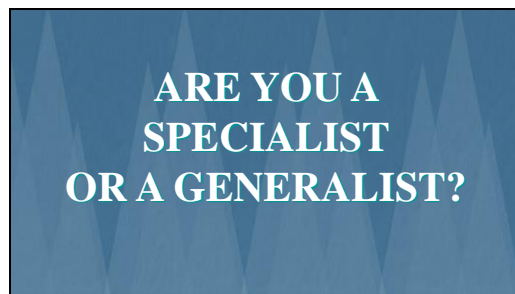
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THE WATCH



Everybody knows what to do and when to do it.

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COPYTALK

Dictate notes in front of client

Review each and every year

Take compliance very seriously

Make sure your clients understand what they have

Read and learn as much as possible

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WORKSHOPS



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ARE YOU ASKING FOR REFERRALS AND
ARE THE FISH CHASING THE BOAT?



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WHO SCHEDULES YOUR MEETINGS?



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WHERE ARE YOUR MEETINGS HELD?



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ROUND TABLE VS. STANDARD TABLE



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COFFEE / CAPPUCINO



Slide 27

FRESH MADE COOKIES



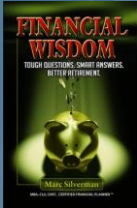
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PICTURES NOT PLAQUES



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FINANCIAL WISDOM



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BIRTHDAY
PHONE CALLS



BIRTHDAY
CARDS



www.upwithpaper.com
800-852-7677

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SEND OUT CARDS

An online service where you can send greeting cards with your message.
Simply choose you card, write your message and click send.
There are many cards to choose from: birthday, holiday, sympathy, get well, thank you, anniversary and custom cards.
Visit www.sendoutcards.com or call 408-266-3339 for more information.

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GIFTS TO POTENTIAL RETIREES



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PENS & MARKERS



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