



TRANSPARENT
FINANCIAL

Follow Notes

Field Trainer: _____ Date: _____ Location: _____

Approach: *(smile, relaxed, using names, body language, assumptive)*

Rapport: *(conversational, humor, using names)*

Finding a Need: *(asking that critical question and then WHY?, digging in, listening for it)*

Buying Atmosphere: *(tone change, eye contact, get a FOR SURE YES!)*

Benefits: *(asking questions, painting pictures)*

Transition to Close & Close: *(relaxed, body language, assumptive, pen to paper)*

Rebuttal: *(reading claims, body language, act like it's no big deal & then go back to app)*

Solidifying the Sales & Getting Referrals: *(assumptive, memory joggers for referrals)*

Attitude/Self-Talk/Focus Throughout the Day: *(how did they handle the ups and downs)*