

“From the Trenches Coaching E-Mail”

Date: May 20, 2024

From: Dennis Tubbergen

Note: You are receiving this “From the Trenches” coaching fax because you requested information from my company “Rocket Production Systems” sometime in the recent past. You may remember the “Business Blueprint” book revealing how I produce \$20 million in annuity premium each year while working with clients just 10 hours each week.

“The Beauty of Small Numbers”

Can your current business make you the income that you want from small numbers? **If not, you’re working too hard and not working as smart as you could be. An ideal business in any industry is one that can not only survive but thrive with small numbers.** Let me explain.

Used to be that almost every successful financial services professional would market his business using big numbers only and ignore the small numbers opportunities. Smart financial marketers are using small numbers marketing.

Big numbers marketing has traditionally involved mailing 5 to 20 thousand seminar invitations, often with no asset qualifiers, hoping to get in front of enough qualified interested prospects that month to reach that advisor’s income goals. While I’m a huge advocate of the time leverage that seminars, classes and focus groups provide, I’m a strong advocate of small numbers in these events where attendees are perfectly qualified to be clients and predisposed to doing business. I’d much prefer talking to 8 perfectly suited, ideally qualified clients than 50 loosely qualified, marginally interested prospects and having to ‘sift through them’ in order to find the 8 that were qualified to begin with.

I recently affiliated with a trust company to market trust and estate planning as a new client attraction method.

Before I affiliated, I plugged into their marketing program which they claimed was ‘amazing’.

They told me that they were getting 40-50 households into three seminars with one 6000-piece mailing, and from that, they were getting 15 to 20 new client interviews from those three seminars.

I refused to schedule three seminars; instead, I scheduled two citing my past experience with seminar marketing.

I did get a good turnout at my two seminars that were marketed by the trust company's marketing firm but using their 'proven' presentation, I got a 20% sign up rate for appointments, half of which were not qualified. And I'm a good front-of-the room presenter, outperforming most.

I'm writing these next few paragraphs with egg on my face. I should have known better than to invest in marketing that I had not thoroughly investigated, and I should have avoided using the presentation that was not structured the way I know a presentation needs to be structured to be successful.

Sigh...

No matter your level of success, every now and then, every one of us has a 'shit for brains' moment – me included.

I decided to fix all that ailed this process.

I researched and generated a list of only highly qualified prospective clients and mailed a seminar invitation to two seminars just like the trust company's marketing firm did.

I then completely rewrote the presentation, using the presentation structure that I knew had a really high probability of succeeding.

I got fewer responses to my marketing, but of the prospective clients attending my seminar, 50% signed up for an appointment after a brief 1 hour and 15-minute presentation.

All appointments scheduled were with qualified prospects and I generated the appointments for less than \$500 apiece.

I turned around this program by changing it from a large numbers "masses of asses" marketing effort to a targeted and focused small numbers approach.

Hard to beat a small numbers business. This week in your work 'on' your business time, think about how to put this strategy to work for you in your business.

<u>Date</u>	<u>Call Topic</u>
May 20	Life Settlement Case Studies
June 3	NOW: Trust Sales Training
June 10	Five to Six Figure Advanced Planning Case Studies
June 17	RMD Planning to Acquire New Clients
June 24	Five to Six Figure Advanced Planning Case Studies