

“From the Trenches Coaching E-Mail”

Date: July 29, 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.

As I write this week’s coaching e-mail, just one day before it is disseminated, I have just finished another New Retirement Rules Class.

It is a great small numbers business.

Out of the seven households that attended, six are coming in to meet with me and all are predisposed to doing business with me.

Why?

Quite frankly, I work harder than just about anyone I know to understand the current economic environment and to hone my presentation skills. As a side note, one of the advisors who was on the livestream, watching the event, felt compelled to offer suggestions for improvement in the presentation. I am obviously ignoring the comments given that year-to-date, my closing percentage out of the class stands at about 93%.

That’s a difficult number to improve upon and even if I get my closing percentage from 93% to 96%, that’s not enough of an improvement to pay me well for the effort.

If my closing percentage was 70%, I’d have a completely different take.

So, where am I spending my efforts to improve my business?

In marketing the New retirement Rules class.

I have another advisor in my office to see prospective clients from the class once my schedule is full of the kind of qualified prospects that I want to see.

Rather than working on something that can’t possibly pay me well for the effort expended like making the presentation better, I am wisely choosing to expend energy where it is likely to give me a return on investment.

Here are the other things that I am working on in my business.

I recently developed a planning strategy that I shared on a coaching call. The strategy can allow high net worth individuals to potentially take assets out of their IRA or other retirement account at no cost to them.

The average revenue per client generated from this planning process I project will be in excess of \$200,000 per client.

To support my marketing efforts for this strategy, I wrote and recorded a webinar, I wrote a sales letter with an extremely 'ballsy' guarantee, and I am about halfway finished with a book on this strategy as well as others that will attract high net worth and high-income prospective clients.

As a side note, my ballsy guarantee is: "I'll save you a minimum of \$200,000 in taxes to your complete and total satisfaction, or I'll give you \$5,000 for wasting your time."

If you're thinking all that sounds like a lot of work – it is.

But I break down my goals into daily activities. When I write a book (this is my ninth), I write 1000-1500 words each day for a month after the research is completed. By taking this very disciplined approach to writing, I can complete an entire book and get it off to the editor in 2 months, or even less.

The key to success in the financial services business, or any business for that matter, is to clearly identify your goals, precisely identify what activities are required to achieve your goals and then determine what activity is required every day to reach the goal(s).

As John Maxwell says, making a decision to be successful is easy, it's managing that decision on a daily basis that causes difficulty for most people.

I manage my decisions by using a simple index card system. Once weekly, I review my goals and tweak them if I can improve them. Then I make a list of the activities needed to reach the goal. Then, I prioritize the activity list. Then, at the end of each day, I list the next day's activities on an index card, checking the activities off as completed.

Yet on my list today is to write a minimum of 1000 words in my book. This week's message, set clear goals and then effectively manage them.

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| August 5 | Precious Metals Sales Strategies |
| August 12 | Case Study: Combining Income and Charitable Strategies |
| August 19 | Killer Telephone Strategies |
| August 26 | Asset Protection Planning |