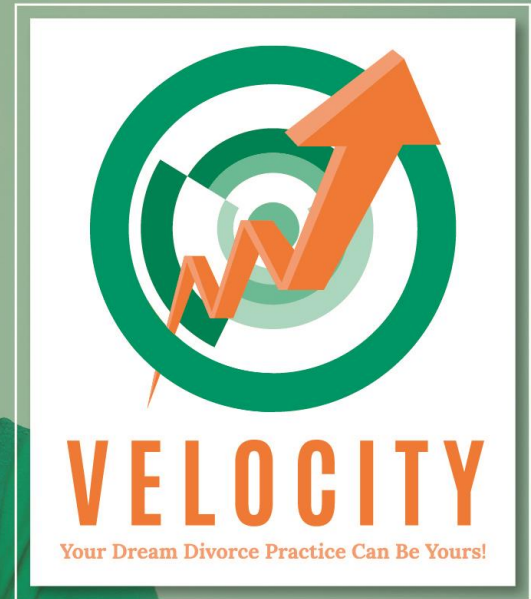


Where Divorce Professionals
GET READY, GET REAL, GET RESULTS!



Mastering The Initial Consultation

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Initial
Consultation

Getting your head
right about “SALES”

Framework for
Success

Converting with Confidence





Sales Mindset

Used Car Salesman



Sales as Service





Grade Yourself



Framework

Clean Energy



You're the Prize!





I AM THE PRIZE!

- IDENTIFY CREDIBILITY
 - Make list of all of your successes in your business
 - Make list of all of your successes in personal life (family, spirituality, relationship...)
 - Make list of all of your certifications and credentials
 - Sort the list in order of importance to you
 - Identify the top 5 in each area
-
- IDENTIFY EXPERIENCE
 - Experience is the wisdom learned along the way to gaining your wisdom.
 - Take the completed Credibility List and apply the following questions to each item on the list:
 - What was the biggest challenge for me to accomplish this task?
 - What pain did I experience as a result of this challenge?
 - What did it cost me (materially, spiritually, emotionally)?
 - What is the greatest lesson I learned (wisdom gained)

Before the meeting.....

Pre-Consultation Questionnaire

Questions to ask the clients on the phone as they schedule the free consultation to determine needs and screen for appropriateness. In addition to these technical details, keep in mind that you are trying to find commonalities with the client and connect with them on a personal level. We want them to think of us as a trusted friend throughout this process.

- How did you hear about us?
- Where are you in the process?
- Are there attorneys already involved in the process?
- How long have you been married?
- What do you know about what we do?
- Are you amicable enough to mediate?
- How much do you two agree on so far?
- What do you and your spouse do for a living?
- Are there minor children involved?
- What are the plans for the marital home/primary residence?
- Do you own property other than your primary home?
- Do you own rental property?
- Do you own a small business, LLC, or Corporation?
- Do you have property that was in place at the time of marriage that will be claimed as sole and separate property?
- Are there retirement funds to consider?
- Does either spouse have RSU's or other company provided stock options to consider?
- Can you both come in for the consultation together? (advocate or a financial neutral)
- Do you have any concerns that either party may be hiding assets?



Initial Assessment

Convert With Confidence

RAPPORT	AGENDA	WHY NOW?	LEAD	
REALITY	VISION	ROADBLOCKS/IMPACT		Create Desire
VALUE	SOLUTION	YOU'RE HIRED!		Get Hired



Initial Assessment

Convert With Confidence

RAPPORT

I know how difficult it was to come in today, but I am happy that you've decided to come.

You've made a really good decision by deciding to start here.

How did you hear about us?

AGENDA

I've set aside 30-minutes to explore your situation and decide how best to move forward.

Tell me a little about your story.

(If it get's too long) Let me interrupt with just a few crucial questions that I need to ask. (go into initial consult questions)

WHY NOW?

Why today? Is it urgent? Where are you in the process?

VISION

What do you want to say about your marriage when this is done? What would it look like if this process was very successful for you? (Listen to their words. You'll use them in Value.)

REALITY

What are the dynamics right now in your marriage?

What do I need to know about your situation?

ROADBLOCKS/IMPACT

What prevents you from getting to that future that you envision after this divorce?

How does this impact you?

What happens if you don't get the answers you're looking for?

VALUE

Re-cap and re-state. You want 'abc', but the reality is '123.' And you said 'xyz.' Is that accurate? Does that sound right?

SOLUTION

This is exactly what we do for our clients every day. We help people just like you to 'abc.' Based on our conversation, I can clearly see that you need . . .

YOU'RE HIRED!

Would you like our help?

How would you like to proceed from here?



Q&A

Thank You!

To schedule your free 20 min strategy session go to:

<https://calendly.com/nancy-67/cdfa-strategy-session>

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