



Advisor Connect | It's All About Relationships

MAKING IT ACTIONABLE

Lead generation, sales funnels, and closing are all important aspects of our business development efforts. Lead generation refers to our internal process, while “relationship gen” focuses on how we solve other people’s problems. The latter is key if we’re going to be more than transactional and earn long-lasting relationships.

Too often we sell based on plan features, services and price, all of which are important, but are also seen by many as commodities. Refocusing on our understanding of our client’s needs and goals helps us differentiate and build a stronger foundation for a long-term relationship.

ACTION TO TAKE NOW

We suggest a focus on reducing complexity and risk.

- 1 | Simplify** the complex. The vocabulary of the rules and regulations of retirement plans can be overwhelming. Watch your use of jargon that may not be familiar.
- 2 | Guide** your client through the complexity by remaining focused on their specific goals. Tie everything back to solving their problems.
- 3 | Focus** on the long-term. Yes, the plan may provide immediate benefits to the business owner. But retaining the business means we’re always looking ahead to avoid problems and ensure our solutions continue to meet evolving needs.

We value our relationship with you and look forward to continuing to invest in your success. Let’s talk about how we can best work together to build lasting relationships and help others succeed.