

TIP OF THE WEEK

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IDEAS

I met with a rep I hired a few years ago to see how he is maneuvering in this crazy market and he said he is conducting "briefings" with his clients. He said most of his clients and prospects that are affluent and successful are more skeptical and cautious than ever. In order to gain that important face-to-face meeting with them, he created a meeting for only 10 or 15 minutes to "brief them" on new ideas and proactive strategies during this crisis.

He schedules these briefings at 10 minutes before the hour or 20 minutes after the hour. He found research which proves this increases the perception that this will not be a sales event but truly is to be a briefing. The odd time also encourages prospects to set their time aside for you. The goal here is to use the briefing simply to share your insight, proactive strategies, and to capture their interest; then schedule a time to discuss issues raised in your briefing. The key is to truly make this a briefing.

He said be sure the 2-3 ideas and proactive strategies you cover in the briefing are appropriately at a high level and are based on your market and personal research.

Remember to be a source of information and insight and you will win new clients in this market. People are seeking answers! Make sure you become the Financial Expert in your community, strike now!

If you are like me, organization of your office after a hectic day is a pain. Try this web site:

<http://www.orgcoach.net/>

I think this site gives you a number of ways to be more efficient in regards to organization and customer touches.

Here is another site I use. This was one of the first books I read when I got into this business; try this website: <http://www.grahaminvestor.com/>. Ben Graham will help you decipher this market and give you ideas for your client presentations.

What was I thinking? There is too much gloom and doom so I am taking the TV out of my office today. I needed some new juice so I grabbed a copy of Sam Wyly's book, "1000 Dollars and an Idea." I am always on the lookout for inspiring new ideas and Sam's book has an innovative approach to making things happen. Here is his web site; <http://www.1000dollarsandanidea.com/>. All of us are looking for new ways to calm and comfort our clients. Think of your typical day. What is the most important thing you do? It's GETTING THINGS DONE. I talked with a few reps this week and most of them are stuck in the "What do I sell? What do I do syndrome?" Again, the most important aspect of our day is to GET THINGS DONE. Here is another great book on this very subject.

If you are looking for ideas and letters/postcards to send out, take a look at Franklin Funds (https://www.franklintempleton.com/retail/jsp_cm/sales_tools/bus_builder/let_post/gen_letters.jsp). I have used their information, slides, letters and marketing materials for many years. Take a look at their performance as well.

I went to Time Magazine's archives web site (<http://www.time.com/time/coversearch> and ordered several front page covers. Review the front covers that you think might help you deliver the message that America has bounced back from their fair share of bad markets. That visual may help calm the nerves. Frame or laminate the covers and use them in your presentations.

There are various sites you can go to that will help you with your presentations. I have always liked Aim/Invesco Funds for their straight shooting marketing pieces. I have attached two of them here but you can log onto their web site (<https://www.invescoaim.com/portal/site/aim>) for additional pieces. Register with them; they have a number of great pieces on investing. If you have not been using this kind of stuff, start now!

I have been a very loyal customer to Franklin Covey for years. I use their pocket version for my calendar, to do's and notes. They are offering a great seminar on time management: "Learn how to gain 3 hours a week guaranteed." Here is their web site for the seminar. Go there to register. <http://www.franklincovey.com/tc/events/calendar?source=WEB5324&sc=0804-publics&c=0804-publics&product=PublicsRegisterFocus>. Investing some time in yourself is the best investment you can make.

A few of you had asked me what I used for a headset while I am on the phone. Bear with me while I reminisce. In 1987, when the markets took a dive, I closed the blinds to my office, got a liter bottle of cold water, and had my assistant hold all calls for 2 hours in the morning, the time of day during which I was most "motivated". I put on my headset and walked around while I made calls to my clients. For over several years, I have had great luck with the Plantronics Telephone Headset Model H91 Encore. I purchased it from www.ahernstore.com for \$89.95; Plantronics 43038-01 QD to 2.5mm cord \$10.90 (this is a converter that allows me to use it with a 2.5mm jack on a standard phone); Plantronics 40711-01 Lightweight 10' extension \$18.95. Make the call, set aside the time, be enthusiastic when you call and reach out and touch your clients.

CELEBRATING 32 YEARS OF EXCELLENCE



Randy Clark
Midwest Business
Development Director

WRP INVESTMENTS, INC

Primary Business Address
4407 Belmont Avenue
Liberty Township, Ohio 44505

Phone: 800-589-2023
Home office phone: 608-742-5022
Mobile: 608-697-3361
Fax: 608-742-6326
E-mail: maris61@charter.net

Tip of the week is meant to be a useful tool for you. If you have an idea that has worked for you, pass it along, and if you find this is not helpful, just send me an email and I will delete you from our mailing list. I look forward to hearing from you.

If you know of someone looking for a change or not happy with their current BD, call me.