



7 Critical Conversations to Build a 7-Figure Business

*A Special Guidebook from
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By Bill Bachrach, CSP, CPAE



There are vital ingredients necessary to engage people in the conversations that turn leads into prospects, prospects into clients, and clients into people

who take action on your advice and refer you to their friends, family, and colleagues.

These vital ingredients are easy to understand but hard to master.

Let's first examine the vital ingredients, The 7 Critical Conversations.



Critical Conversation #1: Mastery of the first conversation.

Every future Ideal Client relationship starts with a stranger. However you choose to prospect and market, your ability to engage strangers is critical to your success.

How do you engage a person or couple, in any situation or environment, in a way that inspires them to want to talk to you again without coming across like a schmucky financial salesperson trolling for business?

This is a skill that anyone who is dedicated can master. It's about asking the right questions, listening with empathy, hearing what's most meaningful, important, significant, and compelling to them, and then being able to make an offer to take a simple first step that's relevant FOR THEM.



Critical Conversation #2: Mastery at scheduling the appointment.

How do you inspire people, both spouses, to come to your office with all of their financial documents? Given all the demands on their time and all of their options for getting financial education, information, advice, and products... what will be the reason they agree to take the time to get their financial documents together, carve time out of their busy work schedules or retirement activities to come see you?

It won't happen by accident. It's a skill that can be mastered. Scripted, practiced, and executed in the real world.



Critical Conversation #3: Mastery at opening the first face-to-face meeting is vital.

People have embedded in their subconscious minds an imaginary trust dial. And everything you say and do moves the needle on the trust dial one direction... or the other. We're talking about the first 45 to 60 seconds. It HAS to be scripted. It has to be scripted word for word and you have to practice those words over and over and over again until you are brilliantly effective. Not just at delivering the words, but with the right tonality, the right facial expressions, and with a totally trustworthy way of being.

Do you remember that scene from the movie Jerry McGuire where Renee Zellweger's character said, "You had me at hello?" That's your goal: to have them at hello.



Critical Conversation #4: Mastery at making an emotional connection in the face-to-face interview.

What follows the opening is a conversation, with each spouse, about their personal core values. Core values are the emotional why that drive all of their important decisions. Most FAs jump too quickly into asking clients about their goals without laying an emotional foundation of why they want what they want. The skill to set this emotional foundation is crucial. Why always precedes what.



Critical Conversation #5: Mastery at helping people define clear targets with specific dates and amounts of money wanted.

Their goals are the tangible what they want built on the foundation of their values. You can develop the skill to lead an emotionally compelling and inspiring conversation about their goals. It's a skill, maybe even an art form. And it's learn-able.



Critical Conversation #6: Mastery at financial benchmarking.

The skill to handle their financial documents with finesse... without getting deep into the details or the irrelevant stories about the history of each document.

This is a 10-minute benchmarking exercise that establishes their current position on the road to achieving their most important goals and fulfilling their most deeply held values. Sometimes the skill to be developed is

learning what NOT to say. It's okay to have a thought you don't express, right? Otherwise, you end up with LONG meetings that deter people from hiring you.

Remember the confused mind says, "We'll think it over." Why do they have to think it over? Because there was too much detail to make a decision right now. We value people who simplify our lives and save us time. This is a skill you can master.



Critical Conversation #7: Mastery to articulate your value promise and make your offer for them to become a client.

How succinctly and effectively can you articulate your value promise? How well can you answer the two simple client questions, "How much does it cost?" and, "What do I get?" without over-explaining the details or giving a lecture that would only interest a graduate student in economics, but bores your prospects and clients to tears.

If you "had them at hello" you can easily lose them here. When this face-to-face meeting is done effectively you much more often hear, "let's get started" and you seldom hear, "We need to think it over."

The collective mastery of these 7 Critical Conversations will give you the skill and the confidence to talk to anyone, anytime, anywhere... The skill and confidence to speak with any one, anytime, anywhere is how you get the clients you really want, build the business you really want and live the life you really want.



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The most brilliant financial planning technician, the most savvy investment advisor, the most talented wealth manager, or the most knowledgeable insurance, estate planning, or tax expert does not stand a chance of building an Ideal Clientele without a high level of skill and confidence with these 7 Critical Conversations.

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Thousands of Financial Advisors have been taught the 7 Critical Conversations to quickly help them elevate trust and build a 7-figure business. These Conversations are proven to help you attract and quickly get hired by high net-worth clients. Where can you access these? On Bill Bachrach's AdvisorRoadmap™ Virtual Training Platform. [Discover more](#) about the new era of Financial Advisor training, at www.YourAdvisorRoadmap.com.



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