

S.T.E.A.M. INTERVIEW

Relax! Be Excited!

Date:	Name:
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Before we get started I'd like your help with something...When I say;
ON A SEPARATE SHEET; [keep your head down and expect the number. List the names & phone numbers below first, then qualify the "market"]

S Who has the best people **S**kills who comes to your mind; [WFA] great, what's his/her/their area code; 626 – 818?

T The best **T**eacher or coach you know; [WFA] great, what's his/her/their area code; 626 – 818?

E Who is the most **E**nergetic person you know; [WFA] great, what's his/her/their area code; 626 – 818?

A **A**mbitious, who is ambitious; someone who wants to do something different or special with their life? [WFA] great, what's his area code; 626 – 818?

M Who impresses you that is self-**M**otivate, a self starter?

If I were to call [REFERRAL] and tell him/her/them you said [REFERRAL] was the most [S.T.E.A.M.] person you know, would he/she be offended?

I was told or I know you're set, so this is probably not for you, but you could be a great help to me in my expansion efforts...

My presentation will cover; Who we are, what we do and what's in for you; As I go through my presentation, I want you to ask yourself three questions;

IS PRIMERICA A
CREDIBLE COMPANY?

DO THE FINANCIAL SOLUTIONS WE
CREATE SIGNIFICANTLY IMPROVE
PEOPLE'S LIVES?

WHO DO YOU CARE ABOUT THAT
WOULD BENEFIT FROM MEETING
WITH US?

Because if you decide to refer people, become a client or represent us either as a part-time person or become a leader in our expansion efforts, this would be important to you, wouldn't it? As we go through my material, I'll ask you "If anyone else comes to mind?" and we'll jot their names down.

Now let me show you how we assist families like yours get on a financial track to accomplish their dream life... *Start your presentation (using the "6 PAGE", have a sample FNA and a sample SMART Solution with you and flip through it at the appropriate time.)*

After you go through the presentation and share a "REAL" example a of SMART solution; you say;

Can you see the value we bring to families?

I'm putting together teams of great people who would want to earn great part-time income or possibly transition into a full-time career with a six-figure income. Now I know you're doing fine and this probably isn't for you, but if you were to put together a team of people that would be success-minded, that I could train, who would you talk to first?

If they say: I'm interested...

Great! What I need to do next is;

1. Meet with your spouse, because I don't want to invest my time training someone if their partner is not supportive. What day can I swing by _____ or _____? *Schedule a time to meet at their home.*
2. Introduce you to our current Leadership Team, *Schedule for the Opportunity Night.*

If they say: I'm not interested...

Great, I wasn't thinking of you...I was told you're fine. By the way, what appealed to you most about the Financial Needs Analysis? Was it the retirement, college analysis, debt elimination solutions? Would you be offended if I competed for you business in any of those areas?

If yes...schedule a time in their home. What day can I swing by _____ or _____

If no...thank them for their time...ask permission to stay in touch.

Immediately after your appointment, call the leads..

Hi {REFERRAL} this is {YOU} We have a mutual friend {REFERRAL SOURCE}, did he/she mention I would be calling? I met with her/him earlier today and we were discussing my business. He/she said you were the most _____ person she knows, if that's true, we need to meet. She said you probably wouldn't be interested yourself but you'd be open to helping me expand my business by pointing me in the direction of people like yourself. All I would need is about 30 minutes, what's better for you days or evenings?

Again, I was told it's probably not for you, but you would be helpful.

S.T.E.A.M List

(Get the names and numbers first, then qualify each)

Name;	Best way to reach them;	Relationship	Office use only
1.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
2.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
3.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
4.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
5.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
6.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
7.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
8.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
9.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
10.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
11.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
12.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
13.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
14.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
15.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
16.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
17.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
18.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
19.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O
20.		<input type="checkbox"/> Family <input type="checkbox"/> Friend <input type="checkbox"/> Other	M A C H O