

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 Skills who comes to your mind; [WFA] great, What's his/her/their area code; 626 – 818?

T

The best Teacher or coach you know; [WFA] great, what's his/her/their area code; 626 – 818?

E

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

A

Ambitious, 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 are self-Motivate, 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...

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 your 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.

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