

Conference Call January 6, 2015 at 10am

Call in number 716-274-3400 Code 122150

- 1) How to communicate with the various types of clients you will encounter:
 - a) Four different personality types
 - I) "The Boss"
 - aa) Wants to be in charge
 - bb) Talks loudly, and slowly
 - cc) Dresses conservatively, with a distinctive feature (business suit, with red tie, for example)
 - dd) Will challenge you
 - ee) Wants to work with a strong professional
 - ff) You must be strong in dealing with this client, but allow them a measure of power in the relationship
 - gg) Tell this person how the process will work, do not ask them how they want it to work; for instance, do not ask what value is his/her property, tell them what value you will use
 - hh) Makes decisions based on logic, with an emphasis on how much they feel you are good at your job
 - II) "The Entertainer"
 - aa) Likes to talk about himself
 - bb) Speaks loudly and fast
 - cc) Dresses ostentatiously
 - dd) Does not want many facts, they confuse him
 - ee) Will make decision based on feelings, if he likes you
 - ff) Ask him questions about himself, and let him talk
 - gg) Listen and you will find out what he wants
 - hh) Tell him how the process will work, but keep it simple
 - ii) This person will take some patience, and hand-holding
 - III) "The Accountant"
 - aa) Wants to take time, and look over every detail, before making a decision
 - bb) Talks softly, but fast
 - cc) Dresses awkwardly, even carelessly
 - dd) Wants to look at figures before proceeding, and will scrutinize thoroughly
 - ee) Cooperate with his wishes, but he may procrastinate unless you dictate the action
 - ff) Once he commits, he is usually good to follow through
 - gg) Wants to make decisions totally on facts
 - hh) If you can get this guy to laugh, you are well on your way to an application signed
 - IV) "The Counselor"
 - aa) Will usually take the longest to make a decision
 - bb) Talks slowly, and softly
 - cc) Dresses well, but not to stand out
 - dd) Is friendly, and wants to make a decision that is best for both him, and his loved ones
 - ee) Will make his decision based on both emotion and facts
 - ff) If he likes you, the deal is probably going to be yours
 - gg) You must prod him along, and try to get him to take action ASAP
 - hh) Emphasize how much the product will improve his life, and make things easier on his family- 2) Scanning Applications so that can be submitted properly
 - a) Just a notice that scanned applications that are larger than 12mb will have to be re-scanned and why.