

Senior Freedom Inc.

Conference Call Feb 9, 2016 at 10am

Call in number **712-832-8310** Code 122150

- 1) Identifying how to talk with various clients
 - a) Each client must be identified ASAP as to his/her personality
 - b) You must communicate in a manner which will be most effective to your client
 - c) The 4 personality types in regard to sales
 - I) "The boss"
 - A) Talks slowly and loudly
 - B) Dresses conservatively, but with a subtle flair--want to display his/her power
 - C) Extroverted
 - D) Wants to be in charge
 - E) You must show strength without getting into a power struggle
 - F) Will talk to dominate
 - G) Makes decisions quickly
 - H) Must impress him/her that this is a great business decision
 - I) Must provide facts, but must also connect with him/her
 - II) "The Entertainer"
 - A) Extroverted
 - B) Talks quickly and loudly
 - C) Likes to talk about self
 - D) Dresses outlandishly
 - E) Makes decisions quickly
 - F) Makes decisions based on feeling
 - G) A lot of facts/stats will only confuse him/her
 - H) Will buy if he/she likes you
 - I) Must give him/her the latitude to talk about self
 - III) "The accountant"
 - A) Talks quickly and softly
 - B) Dresses awkwardly
 - C) Very introverted
 - D) Does not want to make decisions quickly
 - E) Only wants facts/stats; does not want feelings to play a role in decision-making
 - F) Will talk endlessly about details
 - G) Wants to see facts first, often before an application
 - H) Be on your game when you talk with him/her--he/she will quiz you
 - I) You must convince him/her that this is a smart decision by using data
 - IV) "The therapist"
 - A) Talks slowly and softly
 - B) Introverted, but sociable
 - C) Dresses practically
 - D) Very friendly
 - E) Will make decision based on how his family is impacted & how they feel about it
 - F) Will want facts, but makes his decision based on both feelings and information
 - G) Will take time to make a decision--do not give up on him/her
 - H) Might sound more interested than he/she really is because of a need to be friendly
 - I) Might need to be cajoled
- 2) Processor Contact –
 - a. Immediate: Text message 512-748-4669
 - b. second method: Email
 - c. third method: phone call ---- in that order.
- 3) In visiting with a forward LO over the weekend, suspicions were confirmed. They are having a nightmare with TRID if they are working for a mortgage bank that leaves compliance up to them (most do)