

**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.