![Text

Description automatically generated]()

**CENTER OF INFLUENCE**

WORKBOOK

**CENTER OF INFLUENCE PROSPECTS**

GOOGLE SEARCH

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

**Characteristic of a great COI for me:**

1.

2.

3.

4.

**PHONE LANGUAGE TO SCHEDULE FIRST MEETING**

Hi XYZ,

My Name is:

I am with (XYZ Company)

I am contacting you because my clients are in need of your services. First, I am looking to interview a few top professionals, like yourself, to see if they might be a good fit for my clients. Secondly, I am looking to create a networking and referral arrangement with a few top professionals where we refer our clients to each other. Does this interest you?

Have a conversation

If yes, then let’s schedule a first meeting to get to know each other. Does Wednesday at X time work for you? Great, I will schedule a Zoom call on Wednesday, XYZ at XYZ time. What is your email so I can send you a Zoom invite.

**Write your Language:**

**FIRST MEETING WITH POTENTIAL CENTER OF INFLUENCE**

1. **3 Things in Common**
2. **Fact Finding Questions about their business**

\*Tell me about your Business.

\*What type of work for you provide for your clients?

\*How long have you been in business.

\*Who is your “ideal client?”

\*What are the “needs” of your clients and why do they work with your firm?

\*What makes your company unique?

\*What is your area of expertise?

\*How have you grown your client base?

\*What is your impression and experience with Financial Advisor/Reps?

\*Have you ever worked with a Financial Advisor/Rep?

\*Are you currently exchanging leads with any Financial Advisor/Rep?

1. **Expectations for Center of Influence Relationships**

\*Frequency of Meetings

\*Exchange of Client Referrals

\*Promote each other’s business

\*Link your Websites

\*Endorse each other on LinkedIn

**SECOND MEETING WITH CENTER OF INFLUENCE**

1. You refer 2 clients to COI
2. Discuss HOW you will introduce your clients
3. Add value and/or information regarding planning, insurance and/or investments.
4. Talk about your Concierge Service

\*Vault

\*5 Diamond Checklist

5. Schedule next meeting

**THIRD MEETING WITH CENTER OF INFLUENCE**

1. Discuss the clients you referred.
2. Receive Referrals from the COI.
3. Add value: article or information.
4. Schedule next meeting.

**SCHEDULE REGULAR TIMES FOR “FUN” MEETINGS**

1. Joint Chambers or BMI meetings together.
2. Go to sports games together.
3. Go to theater together
4. Get spouses and/or families together.

**CONCIERGE PLAN FOR CENTERS OF INFLUENCE**

1.

2.

3.

4.