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ATTACK BY BATMAN AND A DEADLY SHEEP DOG

The Seminars

The Referrals

The Appointment

Sales Activity vs. Service Activity- The Mental Health Field





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FOCUS GROUPS ARE EFFECTIVE WHEN

You have specific populations that you want your product or service to be valuable to

You are willing to offer them something of value in exchange for some face time and their opinions

You have a focus on serving rather than selling





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*HOW CAN ADVISORS USE FOCUS GROUPS
Increase Refer Ability- Your Client is Your Employer*

Layout Your Plan For Your Business

Discuss What Role Growth Has in Your Plan

Discuss What Kind of Clients You Want to Focus On

**Engage Clients in Your Growth Plans and Watch Them
Brainstorm (use the expertise in your base)**

Introduce New Ideas and Gain Their Insight





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HOW CAN ADVISORS USE FOCUS GROUPS *Introduce New Products, Process, or Service*

Examples- Emoney, Products, Equity Management, Fee Based Planning

Introduce Concepts to Clients in a Non Sales Environment

Gain Clients Insight Into the Value of The Product, Process, or Service

Identify Key Selling Points and Objections to Product, Process, or Service

Assess Likelihood of Clients Using New Product, Process, or Services





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*HOW CAN ADVISORS USE FOCUS GROUPS
Gain Face Time and Provide Value to Professional
Relationships (CPA's, Attorneys)*

Allows Advisor and Professional to Explore What “Value” Means

Learn What Education and Information is Important to Clients

Identify Individual Needs and Group Educational Opportunities

Further Your Relationship of Trust With Professional





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HOW CAN ADVISORS USE FOCUS GROUPS *Improve Workshops and Seminars*

Identify How to Improve Current Seminar

Test a New Seminar For Effectiveness

Explore Several Topics for Workshops/Seminars

Invite Former Focus Group Participants to Attend





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HOW CAN ADVISORS USE FOCUS GROUPS *Explore Your Niche Population*

How Do They Respond to Your Services?

What Are They Lacking in Services?

What Characteristics are They Looking For?

How Can You Be More Valuable?





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Step 1 Identify Your Customer

-What are the characteristics of the people that you want to focus your growth on?

- Age*
- Profession*
- Gender*
- Social Network*

-How will you find them to bring them into focus groups?

- Previous Marketing Lists (Drip mail)*
- Professional Relationships*
- Current Client Referrals*





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Step 2 The Invitation Process

Phone calls vs. mailings

Honesty is the best policy

Delegating the phone call

An example of an invitation





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Step 3 Setting the Stage

Where to hold a focus group

The material to have at the focus group

The physical set up of the room





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Step 4 Conducting the Group

INTRODUCTION

PRESENTATION

DISCUSSION

QUESTIONNAIRE

THE FOOD- ASK THE EXPERT SESSION





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Step 5 Build Your Business

SHORT TERM RESULTS

- Consumers will approach you for help

MEDIUM TERM RESULTS-

-Use Information for follow up

-Use Information to put on meaningful educational sessions

LONG TERM RESULTS

-Develop “Rifle Marketing” campaign based on the information you get

-Prior focus group participants are future workshop attendees

-You will get referrals from people who don't even use you

-Fill up future focus groups with past attendees

