

COI Event Scripts

Establishing meaningful, mutually beneficial relationships with Centers of Influence (COIs) are a part of the business plan for many advisors. However, bringing this objective to life and making it a key contributor to net new assets, often proves elusive. Holding events with your select COIs for their benefit can be an effective method to building these relationships. Use these scripts below to invite COIs to the various events. The Carson Coaching Online course on leveraging centers of influence describes these approaches in more detail.

Case Study Approach

With this approach, you will invite 10-15 accountants and attorneys to a “Lunch and Learn” session. Together, the attendees assess the broad financial challenges of an anonymous high net worth client and then offer solutions from the unique perspective of their own disciplines. A sample script follows:

My name is **[insert name]** and I’m a financial advisor with **[insert company name]**. I’m creating a think-tank of professionals who serve high net worth clients to identify issues common to these clients and solutions that work. As a respected **[attorney/accountant]** in our community, would you be interested in meeting on the first Thursday next month with 10 other professionals to review a case study of a high net worth client?

Practice Management Approach

This approach is built on the following premise: the skills that make one an excellent advisor, accountant, or attorney, are not the skills required to run a great business. Use this event to build bridges of gratitude by helping your colleagues identify and develop action plans to address their chief impediments to the level of success they desire. A sample script follows:

GROUP: My name is **[insert name]** and I’m a financial advisor with **[insert company name]**. I’m creating a small group of business owners who serve high net worth clients. This small group will include an attorney, an accountant, and me as the financial advisor. If you are like me, you started your business to serve clients. I often find myself bogged down with running a business which includes managing the team, navigating regulatory changes, keeping the pipeline full, and so many other things. As a respected **[attorney/accountant]** in our community, would you be interested in meeting on the first Thursday next month to learn some best practices from other small business owners?

1-ON-1: My name is **[insert name]** and I'm a financial advisor with **[insert company name]** serving high net worth clients. I'm reaching out to you because of the respect I have for your reputation in our community. If you are like me, you started your business to serve clients. I often find myself bogged down with running a business which includes managing the team, navigating regulatory changes, keeping the pipeline full, and so many other things. Would you be interested in meeting next Thursday to share some insights about what has made you successful and maybe together we can even solve some of your current challenges?

Research Approach (Group)

This technique has two parts to it. First, you engage with select professionals individually by taking them to lunch and soliciting their input on a research project or whitepaper you're drafting. The subject of the whitepaper is the challenges facing financial professionals in your area and you are seeking to discover your colleagues' greatest hurdles and the factors that limit their success. Once you have collected data from a dozen or so professionals, hire a writer to create a draft that summarizes the key points. Once the document has been refined and finalized, it's time for the second part of this technique which happens after the whitepaper has been completed. Arrange a luncheon at a comfortable location that's conducive to discussion and invite your previous lunch partners and several of their colleagues to critique your findings before publishing.

1-ON-1: My name is **[insert name]** and I'm a financial advisor with **[insert company name]**. I'm writing a whitepaper about the challenges facing financial professionals in our area. Would you be willing to have lunch with me to discuss what has led to your success and how you overcome some of your greatest hurdles?

GROUP: My name is **[insert name]** and I'm a financial advisor with **[insert company name]**. I have written a whitepaper about the challenges facing financial professionals in our area. I have some interesting observations I would like to share that may assist you in running an even more successful business for your high net worth clients. Would you be willing to attend a luncheon with other successful attorneys and accountants on the first Thursday next month to critique my findings before I publish?



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