

# The Expert Packet (Checklist & Expert Scripts)

Check off each item as you lead your new team member toward qualifying Manager within 20 days and Fast Start in 24-72 hours!

- \_\_\_ 1. We scheduled their upcoming events: Steps 1-3 at [teamplatinum.biz](http://teamplatinum.biz) (Target: 2 min)
  - See [www.legalshieldcalendar.com](http://www.legalshieldcalendar.com) for their next Business Briefing & Basic Training
  - Team Conference Call: Sundays at 5:50pm PT / 8:50pm ET, 712-432-0075, PIN 739058#
  - Scheduled their first set of “Launch Parties” (PBRs, PCCs, & Luncheons to invite to)
- \_\_\_ 2. We have practiced inviting prospects before calling. (Target: 10 min)
- \_\_\_ 3. I’ve spoken with their 10 easiest and 10 best. (Target: 30-60 min)
- \_\_\_ 4. I have a copy of their 100+ Names & Phone #'s with categories (Target: 20 min)
- \_\_\_ 5. I have spoken to 100 of their prospects (Target: 1-3 min per prospect)
- \_\_\_ 6. I followed up with their guests after PBR & PCC ended (Target: 1-2 min per prospect)
- \_\_\_ 7. They’re now Sr. Associate & understand the baseball diamond: [teamplatinum.biz/recruiting](http://teamplatinum.biz/recruiting)
- \_\_\_ 8. They’ve spoken with Sr. Director about the mentoring program [teamplatinum.biz/mentoring](http://teamplatinum.biz/mentoring)
- \_\_\_ 9. They are re-investing at least \$100/mo for tools & events. (580-536-7424)
- \_\_\_ 10. They are listening to “Core Training” by C.S. Hughes (step 2 at [teamplatinum.biz](http://teamplatinum.biz))
- \_\_\_ 11. They are qualified Manager!
- \_\_\_ 12. They have led someone to manager using steps 1,2, & 3 at [teamplatinum.biz](http://teamplatinum.biz)

## Congratulations on launching your new team member!

**Remind them to lead by example...** Continue to PERSONALLY recruit and Performance Club Qualify each month and Start qualifying for the mentoring program (see [teamplatinum.biz/mentoring](http://teamplatinum.biz/mentoring)). **Repeat this checklist with every new Associate.** \*Remember to call your Trainer and let them know how this process is going for you and be open for coaching.

\*Remember: Their first 72 hours are very important! Do your best to invite at least 100 of the people they know (and meet) to a presentation and schedule to connect them with you afterwards using a 3-way call. Teach them how to STAY in the [Performance Club](#) by showing 3-5 new people/week the presentation, making [2 new friends each day](#), and implementing the [10 Core Commitments](#). (Complete Steps 4, 5, & 6 at [www.teamplatinum.biz](http://www.teamplatinum.biz))

# The “ABC’s” of a 3-way call (for 3rd Party Expert)

**3rd Party Confirmation Call:** If your trainee has already invited their friend without you and told them someone would call to confirm their attendance, say “Hello! This is Ed Expert calling on behalf of Tim (trainee), is Pam available? Hello Pam! Tim told me you’d be joining him on \_\_\_ day at \_\_\_ time to learn more about the new project he’s working on and I wanted to thank you for supporting him and let you know we look forward to getting your feedback afterwards!” **Make sure they know the date, time, location, and what to prepare. However, if the trainee is introducing you on a normal 3-way call do the following...**

**TRAINER (Ed Expert) says something like this:**

**A.** “Hi, Pam. This is Ed Expert, it’s a pleasure to meet you by phone!”

**B.** “Tim just started working with us on an expansion project and we asked him who else he knew who is either sharp and keeping their income options open, or may be a good referral source for him and he thought of you! Sounds like you made it to the top of his list today! Tell me a little more about yourself... What kind of work do you do now?” (Listen) “Ok, and are you keeping your income options open right now?”

**If YES, ask:** “Are you looking for something part-time or something more significant than that?”

**If NO:** “No problem, if we shared some information with you about what we do, would you take a look and let us know who you think might be a good person we can talk to?”

**C.** “Ok, what I’d like to do is get some information in front of you so you understand what we do, how we help people, and if you or someone you know may be a good fit for what we have available.”

**If inviting directly to an event say:** “We have an event on \_\_\_(day) at \_\_\_(time), Can you get free?” (If so, confirm their attendance, remind them that it’s professional attire, they’ll want to bring pen and paper, ask if there’s anyone else they’d like to bring, and let them know you’d look forward to reconnecting after the event to receive their feedback. and get off the phone. If they can’t get free, find another event that works.)

**If leading them to an exposure tool first, say:** “Do you have \_\_\_ minutes now? Great! I’m going to have Tim connect you to a \_\_\_ minute overview so you can jot down what you like best and any questions you have. As soon as you’re done, Tim will reconnect us so I can get your feedback. Based on your response we’ll see where to go from there. Sounds good? Great! Talk to you shortly.” (See the next section for tool options)

**Experts: Remember to keep it brief. If the referral insists on knowing what we do, let them know:**

“We provide services that empower people legally and economically. We have several divisions and opportunities available within the company, but all of the information will be covered during the overview and from there we’ll be able to see if there’s a good fit for you or someone you may know.”

**Tools to choose from (Other tools are listed at [www.teamplatinum.biz/recruiting](http://www.teamplatinum.biz/recruiting)):**

5 minute <a href="#">Income Opportunity</a> overview: (512) 703-6148 (Option 1)	5 minute <a href="#">Membership Only</a> (our services) overview: (512) 703-6148 (Option 2)
18 minute full overview: (518) 530-1699	14 minute opportunity video go to: Prospect App: Resources: Opportunity: Great Work Plan OR <a href="http://www.GreatWorkPlan.com/new">www.GreatWorkPlan.com/new</a> (To download the Prospect by LegalShield app: see step 4 at <a href="http://teamplatinum.biz">teamplatinum.biz</a> )
14 min membership only video go to: Prospect App: Resources: Legal Plan: Great legal benefit Or <a href="http://www.GreatLegalBenefit.com">www.GreatLegalBenefit.com</a>	Your Direct Website (insert your actual login name): <b><i>YourLoginName</i></b> .LegalShieldAssociate.com  To send any of your websites from the Prospect app, go to: Resources: Hubsites & Share Links

**When you reconnect you'll ask 3 questions:**

1. "What did you like best?" (Let them answer) "I can relate." (Share why you can relate and understand where they're coming from.)
2. "What questions can I answer for you, or was everything pretty straight forward?" (Briefly answer basic questions. If their questions are too overwhelming to handle at this moment, assume their interest level is a 7 or below and proceed accordingly...)
3. "Great! On a 1-10 scale, 1 being not interested at all and 10 being ready to get started, where would you say your interest level is on a scale of 1-10?"

**If "8 - 10":** That usually means they're ready and just need some direction on getting started properly. Ask what else they need to know before they get started (Use the "4 Question Close" below if they are interested in the opportunity.) Give them reassurance, sign them up, and repeat this whole process. Have the attitude of a "taprooter" which says, "It's almost impossible for this person to put me on the phone with 10 (or more) people and not have somebody ready to sign up!"

**The "4 Question Close"**

1. "If you were to get started on a part-time basis, how much money would you need to earn on a monthly basis to make this worth your time (realistically)?" (Remember each answer.)
2. "How many hours per week would you be willing to invest realistically (toward that goal)?"
3. "How many months will you allow us to coach you until you get there?"
4. "So if we can help you put together a plan to earn \$\_\_\_\_\_ per month, working \_\_\_\_ hours per week, over the next \_\_\_\_ months, would you be ready to get started?"

**If yes, start completing the paperwork:** "Great! Welcome to the team! The next step is to get your applications done and your direct deposit set up so we can start earning income daily right now..."  
(Complete Steps 1,2,& 3 at [teamplatinum.biz](http://teamplatinum.biz).)

**If no, follow steps for "7" or below.**

**If "7" or below:** Ask what it would take for them to be a "9" or "10", invite them to the next event and/or schedule the next exposure and follow up in your calendar. If uninterested, get them info about our services, ask for referrals, and thank them sincerely for their time.

# Expert PBR & PCC Script:

## Expert Greeting and Introduction:

"Thank you for taking the time to be here today. My name is \_\_\_\_\_ and my background is \_\_\_\_\_."

## Expert's Story: "Prior to LegalShield..."

- Background outside of LegalShield...
- Problem/dissatisfaction: What did you desire to change in your life that made you take a look?
- Solution: What did you see or hear that made you get started?
- Results and/or vision: What success have you had and/or see yourself having in the future?

## Expert introduces the PBR DVD or PCC Pre-Recorded call:

"There are three types of feedback we are looking for today: The first type of person says 'this is not for me right now, but if I can be a referral source for the person who invited me I don't mind referring people.' The second type of person says 'I love it and would like to benefit from the services.' The third type of person says, 'I would like to take advantage of the income opportunity and potential tax benefits.' All three types of feedback are great! We just ask that you keep an open mind as you listen to a snapshot of what we do and how we empower people. Also, we encourage you to take notes on what you like best, what questions you have, and what people come to mind who would benefit from seeing this. **For PCC:** "The overview lasts a little more than 15 minutes. Please stay on the call after it's finished so we can answer a few frequently asked questions and discuss the next step..."

**For PBR:** Host or Expert Plays the Darnell Self "Private Business Reception" DVD.

**For PCC:** Host or Expert 3-ways in the Darnell Self (518) 530-1699 Pre-Recorded call.  
(Decide who will do so beforehand.)

## After the DVD Plays or Pre-Recorded call finishes:

**For PBR only:** "You all have just seen my favorite movie!"

**For PCC only:** "Hold on just a moment everyone..." (Disconnect the Pre-Recorded call.)

**For Both:** "That was the information I heard that impressed me about LegalShield! If there are any at all, there are usually only 3 main questions that people have after a presentation:

1. Is this really true? How can they provide us with so many benefits for so little money?
2. Is this legitimate? How can they pay us so much income for doing something so simple?
3. Can I do this? With my personality, my busy schedule, or my limited contacts can I still succeed?  
The answer is yes, yes, and yes...

LegalShield boasts around \$500 million dollars per year in revenue! The reason the company is so financially strong is because of it's one third, one third, one third revenue split. That means that approximately one third of its revenue goes to the company - LegalShield, one third goes to the law firms (which already equals over \$1 million dollars per month in several states), and the final one third goes into the advertising budget which is paid to individuals like you and I for word of mouth advertising! That means all of the tools, mentors, and events have been put in place so that even if you're busy, scared, or need support, you can still be successful!

As I mentioned earlier, there are three types of feedback we are looking for today and all three types of feedback are great:

1. The first type of person says 'this is not for me right now, but if I can be a referral source for my friend I will refer people.' If that's you, we thank you for your support and referrals.
2. The second type of person says 'I love it and would like to benefit from the services.' If that's you, we look forward to helping you protect and empower your family!
3. The third type of person says, 'I would like to take advantage of the income opportunity (and potential tax benefits for as little as only \$99).' If that's you, we're looking forward to coaching you on how to get paid and promoted right away and assisting you every step of the way. You will truly be in business for yourself, but not by yourself!"

**For PBR only:** Host either has the expert on speakerphone when DVD is done, or live in person. Expert says: "Thank you for your time and for listening! We now want to talk to each of you individually so I can personally thank you and get your feedback." (Host immediately plays music loud enough so those who have questions can ask in private without being overheard by other guests.)

**For PCC only:** "After we hang up from this call, please call or text the person who invited you right away and let them know you were on the call. Afterward they will connect us very briefly by phone. Thank you again for your time and feedback. Our call is now concluded, you can disconnect your line." (After the PCC, Host calls guests one by one to follow up and 3-way into expert.)

**PCC/PBR Expert Feedback Script** (Once host 3-ways prospect to you by phone):

1. "It's great to meet you \_\_\_\_\_ (name)! I just wanted to take a quick moment and thank you for taking the time to listen, and ask you what did you like best from what you've heard so far?" (Let them answer. Listen for if they are more interested in the membership, the opportunity, or neither.) "I can relate..." (Share why you can relate and understand where they're coming from.)
2. "What questions can I answer for you, or was everything pretty straight forward?" (Briefly answer basic questions. If their questions are too overwhelming to handle at this moment, assume their interest level is a 7 or below and proceed accordingly.)
3. "Great! On a 1-10 scale, 1 being not interested at all and 10 being ready to get started, where would you say your interest level is on a scale of 1-10?"

**If "8 - 10":** That usually means they're ready and just need some direction on getting started properly. Ask what else they need to know before they get started (**Use the "4 Question Close"** below if they are interested in the opportunity.) Give them reassurance, sign them up, and repeat this whole process. Have the attitude of a "taprooter" which says, "It's almost impossible for this person to put me on the phone with 10 (or more) people and not have somebody ready to sign up!"

## The “4 Question Close”

1. “If you were to get started on a part-time basis, how much money would you need to earn on a monthly basis starting out (realistically)?” (Remember each answer.)
2. “How many hours per week are you willing to invest realistically (toward that goal)?”
3. “How many months will you allow us to coach you until you get there?”
4. “So if we can help you earn \$\_\_\_\_\_ per month, working \_\_\_\_ hours per week, over the next \_\_\_\_ months, you’d be ready to get started?”

**If yes, start completing the paperwork:** “Great! Welcome to the team! The next step is to get your applications done and your direct deposit set up so we can start earning income daily right now...” (Complete Part 1 of the Launch Packet.)

**If no, follow steps for “7” or below.**

**If “7” or below:** Ask what it would take for them to be a “9” or “10”, invite them to the next event and/or schedule the next exposure and follow up in your calendar. If uninterested, get them info about our services, ask for referrals, and thank them sincerely for their time.

### Getting New Trainees Started Right:

- Remember your intentions: To immediately book follow-up presentations for interested prospects and to schedule the next wave of “Launch Parties” (PBR’s & PCC’s & luncheons) within your organization.
- Always **promote the next event.** (i.e. Weekly Business Briefing, Luncheon, Private Conference Call (PCC), Weekly Team Conference Call, Gameplan interview etc.)
- Schedule a time within the first 24-48 hours to complete their gameplan interview using the **Launch Packet.**
- To prepare for their gameplan interview have them look at steps 1 & 2 at [teampatinum.biz/launch](http://teampatinum.biz/launch) and have them watch “How To Do a PBR” by Brian Carruthers.