

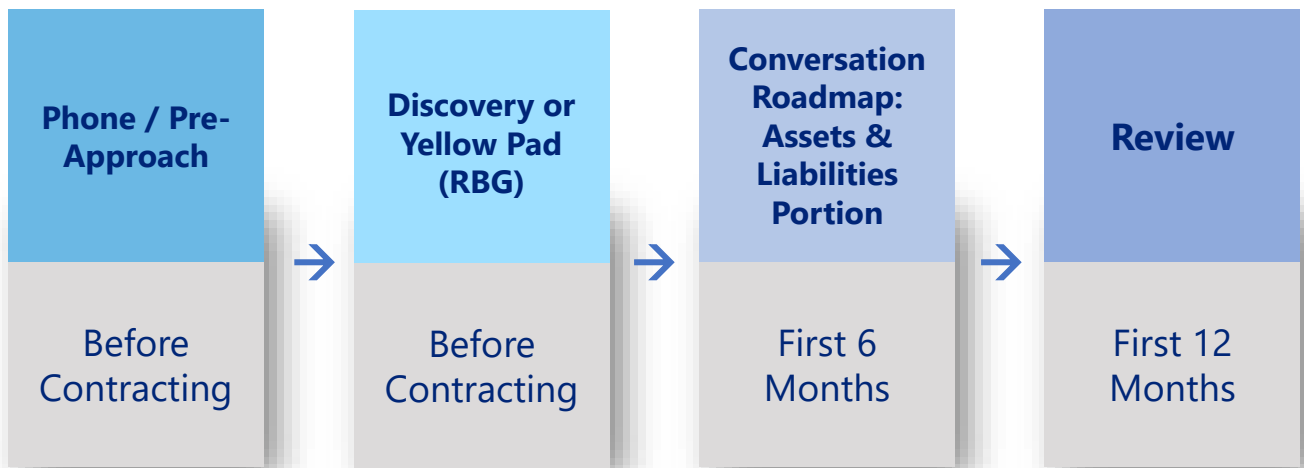


## Video Coach: 5-Step Sales Process

### Phone / Pre-Approach Video Coach Submission

#### Why the 5-Step Sales Process

Over the course of your first year with Equitable Advisors, you will be asked to record four videos related to the 5-Step Sales Process and upload them to our video coaching platform – Video Coach. Your ability to navigate these critical conversations flawlessly will have a direct impact on your ability to win prospects. The Video Coach platform is designed to facilitate direct feedback from your manager as you sharpen these skills.



#### Expectations

For this video, you will focus on your Phone / Pre-Approach, including a clear open and close to the meeting which involves setting the next appointment. This guide includes everything you need to know to prepare and submit your video, including example prospecting video's along with scripts depending on which prospecting approach you will use the most.

Keep in mind that the Phone / Pre-Approach should be a brief prospecting discussion. **Your video should not be longer than 2 minutes.**

Additionally, it is recommended you submit your video from your mobile device, through the Video Coach App. Instructions are included in your course as well as this guide.

# Phone / Pre-Approach Meeting Evaluation Checklist

- Consider your video submission the “finished product” of your work to perfect your Phone/Pre-Approach. Put in the practice and ensure that it captures these elements to avoid having to resubmit it a second time, which will be necessary if you receive anything less than a 4 or 5 on the 5-point scale (details below).
- Know that this isn’t the same as showing up to deliver “your version” of a Phone/Pre-Approach— pay close attention to the Coaching Scorecard below so you’re checking off the major components of the prospecting discussion in your video.
- We invite you to incorporate any home-run-type language into your video. You do not need to read the script verbatim.

## Evaluation Checklist

As you prepare to record your Phone / Pre-Approach video, make sure you’re checking off all 3 components of the conversation. You may want to print this out or have it up as you prepare for the recording.

### PHONE / PRE-APPROACH COACHING SCORECARD

#### PRESENTER:

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- Open - introducing yourself and Equitable Advisors
- Purpose of your call / Value Proposition
- Close - set up meeting (Discovery or Yellow Pad)

The best part:

Opportunity to develop:

# What to Expect from Your District Manager

- Your District Manager will review your video and assign you a score of 1-5 — details on the ratings are below.
- Be prepared to self-reflect on your video and discuss it in depth with your District Manager. This is not a pass-fail test, but a jumping off point for coaching.

## Rating System Overview

- If you receive a 4 or 5, congratulations – you’ve hit on all the key elements captured on the coaching scorecard. The only difference between a 4 and a 5 is in your delivery style, confidence, and technique.
- If you receive a 1-3, you were missing one or more of the crucial elements of the Discovery. You will need to resubmit your video with what’s missing and incorporate any other feedback from your District Manager.
- 3 means you covered some of the content, but you will need to resubmit a new video with the missing elements to earn a 4 or 5.
- If your video is rated 1 or 2, you will need to invest substantially more time to study the core elements and master the conversation. You will not receive a 1 or 2 based only on stylistic delivery. Content is king!

5	Captures 3 key elements, plus exceptional style and delivery
4	Captures all 3 key elements
3	Missing one or more of the 3 key elements
2	Substantial improvement needed
1	Does not follow Phone / Pre-Approach outline

Style is always a work in progress. We need to first master the content. Once we commit to memory the words to say, confidence and delivery will follow.





# Phone / Pre-Approach Options

Select one of the following scripts for your video based on your prospecting approach.

## Option 1: Cold Prospecting

### Goal: Set Discovery Meeting

Source: Ben Mellin, VP, Greater New York



"Hi \_\_\_\_\_, [Your Name] calling from Equitable Advisors, how are you?"

Great—wanted to reach out, not sure if you are familiar with our team here at Equitable Advisors, but we handle financial planning strategies focused on

\_\_\_\_\_ [insert potential needs for target market, ex. investments and insurance]  
for \_\_\_\_\_

\_\_\_\_\_ [insert target market, ex. attorneys in the Cleveland area].

Touching base to see if you'd have 15 minutes next week, where we could break down our practice in a bit more detail and really see if we could be a resource for you too. How do you look Tuesday morning for a call?"

### Example Video:

Ben Mellin

Traditional VP - Greater New York



## Option 2: Natural Market

### Goal: Set Discovery Meeting

Source: Gail Goodman, Phone Teacher  
New Financial Professional Script - For People You Know



"Hi, \_\_\_\_\_ and thanks for picking up.

I'm calling for two reasons.

First, how are things at your house these days?

The other reason for my calls is... I'm calling everyone I know because lots of people are worried about their money. As a financial professional, I want to give you an opportunity for a 20 minute conversation with me and my colleague so we can talk about what's on your mind. We can easily do a virtual meeting.

What time is best for you?"

### Example Video:

Nick Makriannis

Branch Manager – New England





## Option 3: RBG Pre-Approach

### Goal: Set Yellow Pad Meeting

Source: National RBG Team



“Hey \_\_\_\_\_, this is [Your Name] with Retirement Benefits Group with Equitable Advisors, how are you today?”

Great – I’m calling you concerning retirement planning opportunities for educators. You might already be aware of this, but our company services public school faculty and staff in your area and I’ve been spending time with all the teachers who are unfamiliar with the way we can help people save for retirement through their employer sponsored plans.

It will take me 20 minutes to review some important tax and investment information regarding these plans. I will be in your area next week, does Tuesday or Wednesday work best for you?”

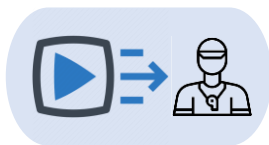
#### Example Video:

Jack Digney  
RBG TSM - Jacksonville



## Video Coach Instructions

Below are step-by-step instructions for uploading your video submission to the Video Coach platform through your mobile device as well as best practices.



[Submitting a Video Coach Assignment](#)



[Mobile App for Video Coach](#)



[Video Coach Best Practices](#)

## Video Taking Forever to Upload?

Try these tips for fast, convenient submissions:

- Read the Video Coach Instructions (hyperlinked above) thoroughly so you know how to film and upload your video
- Keep your video to under 2 minutes



**Quick Tip: Use the Video Coach App when uploading from your mobile device**