



StorySelling

## Office Stories





## If these walls could talk . . .

They do. When clients enter your office, it talks to them. It tells them what kind of person you are, what kind of professional you are and what - if anything - you have in common with them. In short, your office says volumes about you. You can use it to your advantage, turning your office into a powerful sales tool.

### Turning your office into a powerful sales tool

Invesco wholesalers visit thousands of investment offices each year and have accumulated some inside information relative to how financial professionals are turning their offices into powerful sales tools. We have distilled these successful tactics down to six categories - or stories - your office should tell.

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## Is your waiting room “depressurised?”

Your waiting room can set the tone for the relationship. When clients find sales literature, promotions and prospectuses in your waiting room, they may get the notion that you are a high-pressure salesperson - not a financial professional. Think about “depressurising” your waiting room with the goal of establishing a long-term relationship rather than a short-term sale.

Yes No

- Literature**  
Is your waiting room filled with sales literature, brochures and prospectuses, or is it appointed in ways meant to make the clients feel relaxed and at home?
- Greeting**  
Do your assistants greet clients when they walk in? One financial professional has his assistants stand up and greet clients by name when they enter the office - particularly older clients. It shows respect and an appreciation for them as people - not just as customers.
- Investment strategies**  
Does your waiting room illustrate investment solutions? One financial professional who focuses on college saving plans displays graduation pictures of her clients' children - students who have benefited from her college investment plans.
- Activities**  
Does your waiting room give them something to do? One financial professional we know has cookbooks and an old copier in his waiting room so that his clients can copy their favorite recipes. Others have indoor putting greens in their offices for their clients to use or televisions for their clients to watch. Activities not only make the office visit more enjoyable; they also keep clients occupied if you're running late.
- Refreshments**  
Do you offer homemade cookies, coffee, tea or juice?



## Is your office personalised?

What does your office say about you as a person and as a professional? Financial professionals are careful about what and where they place items representing their families, hobbies, education and awards. Do you have the following five topics covered?

Yes No

- Family pictures**  
Are they positioned where they can be seen by you and your clients?
- Hobbies and collections**  
Do you display your hobbies and interests? These not only reveal something about you to your clients but also help establish common interests and personal connections. In addition, they can be the basis for an investment metaphor. One financial professional displays pictures of hot air balloons - a great metaphor for managing risk. Another financial professional displays a collection of model-size farm tractors; many of his clients are retired farmers.
- Community involvement and charitable contributions**  
Clients notice and respect this. Show them that you have strong values and pride in your community. Display thank-you letters and membership certificates to neutral organisations consistent with your firm values and guidelines for political/charitable/community involvement. These should clearly reflect your personal membership- not that of the firm.
- Education**  
Do you display books, degrees, diplomas and continuing education certificates?
- Awards**  
Your awards should not appear at the center of attention. Display these in your waiting room- not in your office.



## Does your office reinforce your business message?

Yes No

- Is it organised and clean?**  
How are you able to organize your clients' finances if your office is disorganised with clutter and piles?
- Does your office establish you as a Wall Street professional?**  
A simple bulls & bears statue or public offering tombstone may serve to reinforce that you are their connection to Wall Street.
- Does it reinforce your commitment to privacy?**  
Can you be trusted with the confidentiality of their financial records? Are there open client files, appointment calendars and financial records in view of others? Are your clients asked to write checks in view of others?

## Removing the "six degrees of separation" Display interests you have in common with your clients.

Yes No

- Spectator sports**  
Do you have sports memorabilia in your office? A signed jersey, baseball or football? An autographed picture? Most teams have websites with product sales. You could also donate to an amateur league, local team or to the Special Olympics and display evidence of donation.
- Participatory sports**  
Do you have pictures, awards or some other evidence of your own athletic achievements?
- Exercise/fitness**  
Display a local walking/jogging route map, a fitness routine for active seniors and/or a schedule of classes from the local YMCA.
- Television/movies/plays**  
Display a Playbill, a classic movie poster or a movie review guide in the waiting room.

Yes No

- Computers/home electronics**  
Make visible state-of-the-art software or hardware that you can quickly demonstrate to your clients.
- Literature**  
Display the current *New York Times* "Best Seller" list. Let clients borrow from your collection of books in your waiting room.
- Cooking**  
Leave out a binder of family recipes or recipes clipped from newspapers and magazines.
- House & home**  
Display original art, antique furniture, a flower arrangement or a decorator's book in the waiting room.
- Automobiles**  
One advisor we know has a reconditioned 1968 sports car parked out back that he shows to his clients. It not only helps to establish common ground with car enthusiasts, but it also helps them reminisce about what they might have been doing 44 years ago and what goals and aspirations they may have long forgotten.



## Does your office help mine for goals?

Biographers and therapists often use reminiscence tools and memory starters to help their clients recall relevant information. These can be stories, pictures, paintings and/or other visual or narrative props. Financial professionals can use similar tools to help their clients recall goals, aspirations and fears that might be relevant to their financial plans.

Yes No

- Travel**  
Travel brochures, vacation destinations and realty guides can help clients recall goals. One financial professional has a floor-to-ceiling-sized map of the world in his waiting room. Some clients like to find on the map cities to which they have traveled.
- Education**  
Place a local college course guide on your waiting room coffee table.
- Career listings**  
Display the AARP\* catalog on careers and contact a local recruiter for a list of second careers for people over 50.
- New business magazines**  
Display entrepreneur publications or local articles featuring local residents who have started their own businesses.
- Guide to retirement spots**  
Retirement destinations can be an important piece of one's financial plan, yet most people under 55 have not given the inclusion of such much thought. Help them along with a list from the Travel Channel,\* have on-hand travel and leisure magazines featuring favorite retirement spots or display brochures about nationwide retirement locations.

\*Invesco Distributors, Inc. is not affiliated with AARP or the Travel Channel.



## Does your office illustrate investment concepts?

Some financial professionals are adding illustrations and office props with the goal of helping to illustrate investment principles and concepts to their clients. Invesco Consulting makes many of these available in the “StorySelling” Guide. Do you have any sales assists?

Yes No

- Long-term market**  
Using props that describe or show the long-term growth of investments since 1929 may help financial professionals explain the long-term markets and the differences between equities and fixed income.
- Today’s market: levels and yields**  
Some advisors use computer screens, chalkboards or eraser boards to give investors a top-line view of investment benchmarks.
- Office props as investment analogies or metaphors**  
Practically anything in your office can be used as an analogy or metaphor when communicating investment concepts to clients. For example, the four legs on a chair can be used to illustrate diversification and balance, a plant can be used to illustrate the need for ongoing care of investment portfolios, and a sports collectible can be used to illustrate the need for “coaching” during the investment process.





## Is your office “age-justed” for seniors?

Here are some simple, inexpensive adjustments you can make.

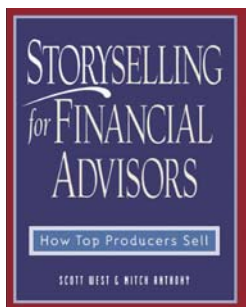
Yes No

- Background noise**  
Is background noise kept to a minimum? Are televisions, radios, office machines, ringing telephones, outside noises and the like making it difficult for clients to hear you? If they make calls from your office, does the phone have hearing amplification?
- Office lighting**  
Is the lighting bright and indirect where the client sits? Are your stairs, doorways and closets well-lit? Consider installing 3-way light bulbs in reading areas.
- Furniture**  
Are chairs and sofas firm and high so that clients can easily get up? Seats should be higher than 17-18 inches and neither slanted-back nor sinking-down. Shelves and literature racks should be higher than 27 inches. Consider lowering shelves and coat hangers to 3 inches below standard height.
- Literature**  
Does investment literature feature non-glossy pages that minimize glare? Is it legible with, at a minimum, 12-point font, minimal italicization and/or reverse type? Is contrast maximized and are yellows minimized? Does the material lead with emotion? Consider ordering literature for the waiting room from senior citizens organizations.
- Doors**  
Are your doors easy to open? Try opening the door with just your pinky and ring finger and avoid door knobs in favor of door levers, which are usually easier-to-use for persons with arthritis. If you can't open the door, consider fixing it or asking your assistant to meet persons with certain disabilities or limited mobility at the door upon their arrival.
- Office signs: large and well-lit**  
Can clients with visual impairments read external and internal signs at eye level?
- Chair height**  
Out of respect, your chair should not position you at a height greater than that of your clients.
- Office hazards**  
Is common space hazard-free? Narrow aisles, wastebaskets, cords, overly plush carpets, scatter rugs, doormats, plants and stairs can be dangerous for those with limited mobility. Hallways and doorways should be at least 35 inches wide. Stairs and steps should be deep enough to hold the entire foot.





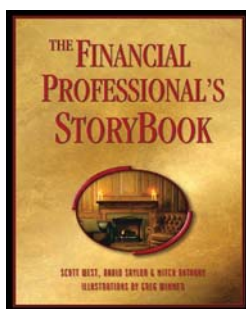
## “StorySelling” books



### **Book: StorySelling For Financial Advisors: How Top Producers Sell**

by Scott West and Mitch Anthony (2000), published by Kaplan Publishing

Learn what makes a client trust you to be their financial advisor. Put the power of story telling into selling financial products. The authors explain the process of making these intuitive connections and then translate their findings into understandable and practical strategies that any financial professional can likely use. They present actual stories from some of the greatest “storytellers” of all time that are designed to help financial pros tap into the “gut reactions” of different types of clients. Included are special topics focused on communicating to women, the 50+ market and the affluent.



### **Book: The Financial Professional's StoryBook**

by Scott West, David Saylor and Mitch Anthony (2003), published by Advisor Insights Press

Scott West and Mitch Anthony, authors of the financial services best-selling book, *StorySelling for Financial Advisors: How Top Producers Sell*, have teamed up with David Saylor to publish the follow-up, *The Financial Professional's StoryBook*.

The StoryBook is a collection of more than 200 engaging analogies, anecdotes, and metaphors designed to help you simplify Wall Street jargon for your clients. These stories were gathered and refined from hundreds of financial advisors, wholesalers, and other professionals who excel at “storyselling.” The wide range of topics include:

- The value of a good financial advisor
- Diversification
- Equity investing
- Understanding risks
- The potential benefits of a comprehensive financial plan



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