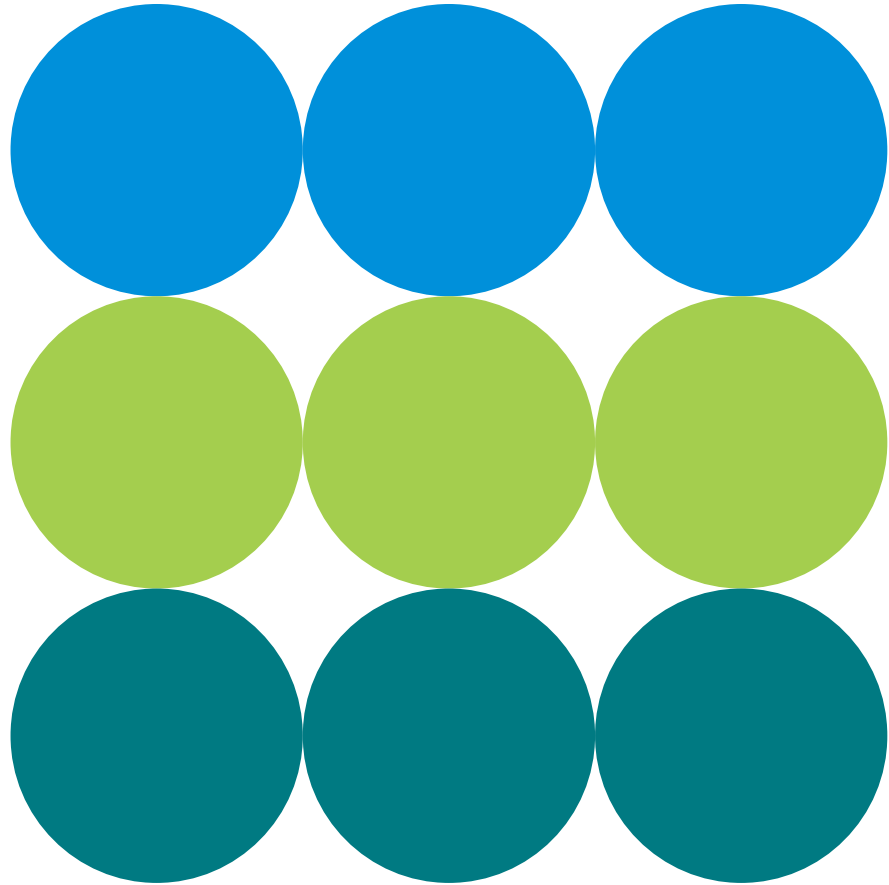




# Designing & Presenting The Solution





## Designing The Solution

# Designing The Solution

## Developing the Recommendations

Before making any recommendation to the client, it is essential to look at all possibilities.

This approach provides the opportunity to do the best job possible in meeting the prospect's needs based on their budget.

One way to approach this, is to develop three different solutions for the prospect:

- The Ideal Solution
- The Recommended Solution
- The Budget Solution





**Developing  
the  
Recommendations**

## **The Ideal Solution:**

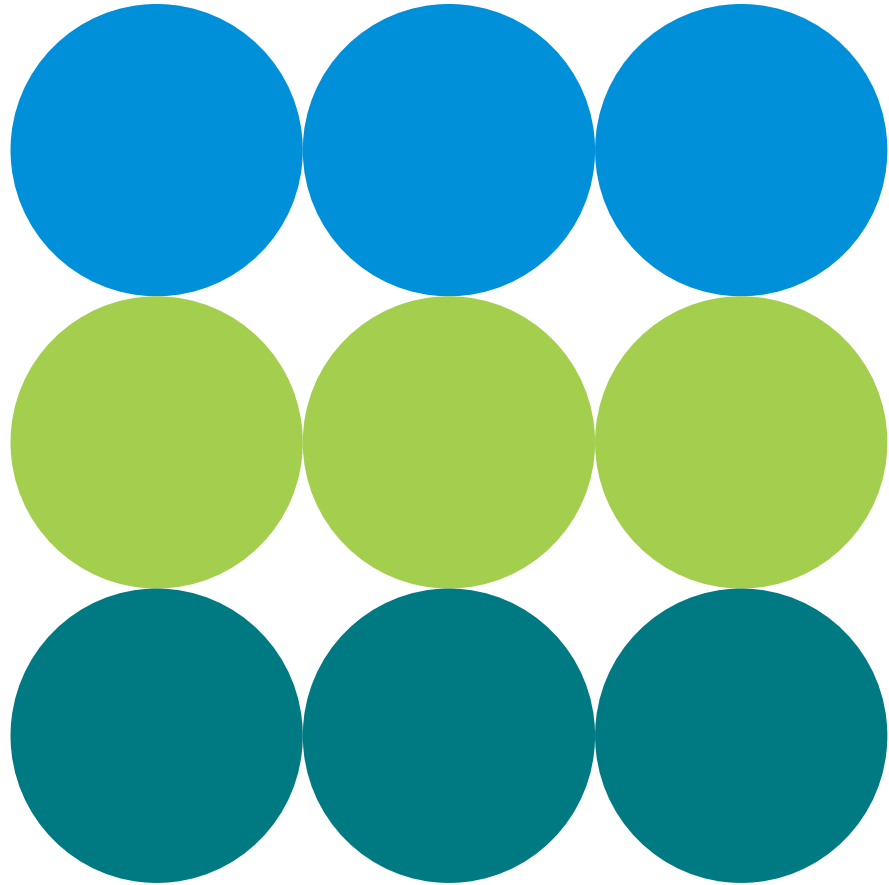
- It is important for the prospect to know how much it will cost to meet all the needs that were identified. Often, the prospect might be surprised at how much it will cost to completely cover every need identified. However, this condition often helps the prospect to take action to upgrade the budget to purchase additional coverage.

## **The Recommended Solution:**

- This solution is the one that will address the priorities identified during the fact finding meeting. The premium required to meet these needs may be higher than the budget that the prospect is willing to spend but less than what it will be required for the Ideal Solution.

## **The Budget Solution:**

- This provides a solution within the prospect's budget. Most often budgets are the determining factor when it comes to choosing the plan. The financial advisor should develop a recommendation that will satisfy as many needs as possible based on the amount of money the prospect has indicated they can spend.



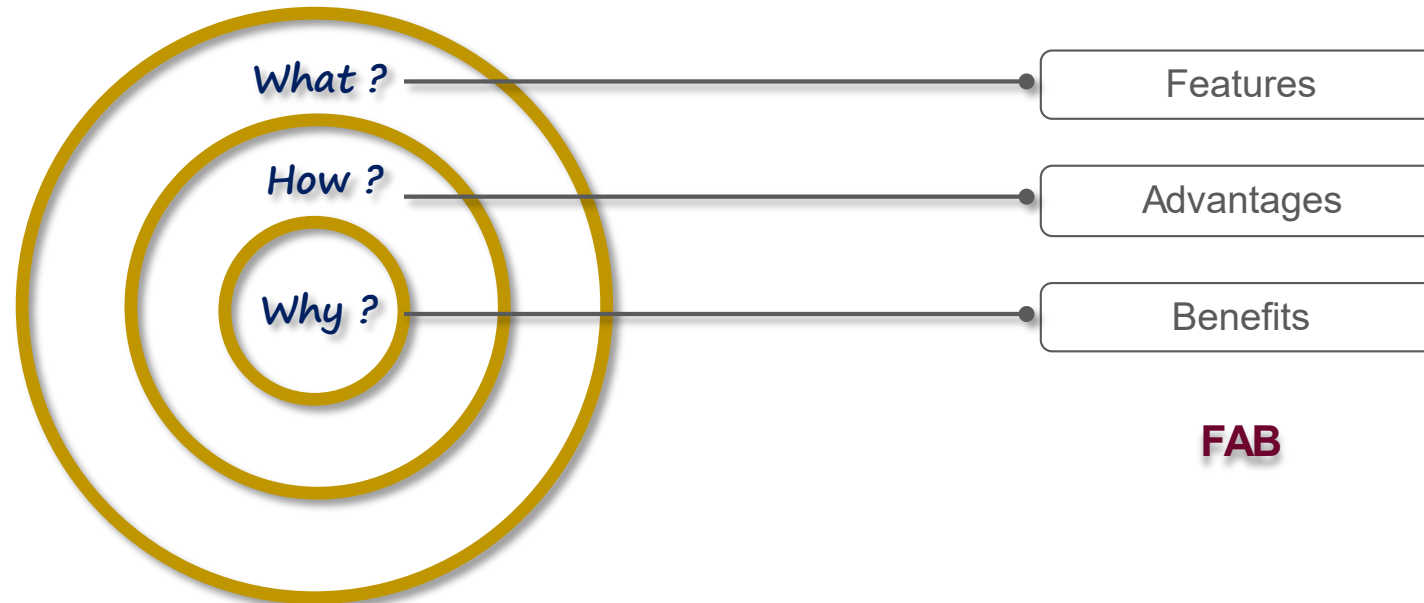
# Presenting The Solution

# Presenting The Solution

## 1- Formulating Your Message

### Implementing The Golden Circle

- **The FAB Statement** : It's not what you say, it's how you say it.



## 1- Formulating Your Message

### Implementing The Golden Circle

- **The FAB Statement** : It's not what you say, it's how you say it.

**F**eatures

What are the main features of your product and what is it designed to do?

**A**dvantages

How will your product solve your client's problems?

**B**enefits

Why will your client buy your product?

### Create your own FAB Statement ...

- Because it has.....Features
- You will have.....Advantages
- Which means that you'll gain.....Benefits

## 2- Being Persuasive

### The Key Concept For Being Persuasive

1. Communicating value
2. **Making the key points clear**
3. Using stories and examples
4. **Clearly articulating motivating benefits**
5. Asking for action
6. **Having passion and conviction**



## Wrap Up

- Closing is the outcome of the efforts exerted during **fact finding** and **solution presentation** phases.
- To conduct **effective probing**, you need to pay attention to the questions you ask and use the funnel technique.
- **Active listening** is a key to identifying the real customer's needs.
- Using the **golden circle** will enhance the impact of your message.
- The **6 key** concepts for **being persuasive** will play a major role in boosting your message.



Navigating life together