



Disrupt or Die

How to Win with Value

A Special Broadcast With Todd Duncan

Notes: _____



The Mindset of Winners

1. _____ never last but _____ do.
2. It's _____ the market that determines your success! It's how you _____ in whatever market you are in that does.
3. If you _____ to be _____, you have to be with the best.

#1: Create Optimal Market Value: How to go from “ON” demand to “IN” demand

1. _____ is the _____ of _____.

"Businesses that optimize emotional connection outperform competition by 26% in gross margin and 85% in sales growth. Their customers spend more, return more often, and stay longer." - Gallup

2. _____, _____, _____, is the essential value on which every LO, Leader, and Company must focus!

"If trust is not my highest value, especially with all this amazing new technology, and all the changes it is bringing my customers or consumers, then how am I leading? If everything is important to you then nothing is important." - Mark Benioff | CEO Salesforce

3. _____ such as recommendations from family, friends, and colleagues is the #1 form of influence. According to Neilsen, 92% of consumers place the highest trust in the medium.

4. The #1 area for you to create optimal value is in improving the customer's _____.

"76% of American's cited money as the leading cause of their stress."

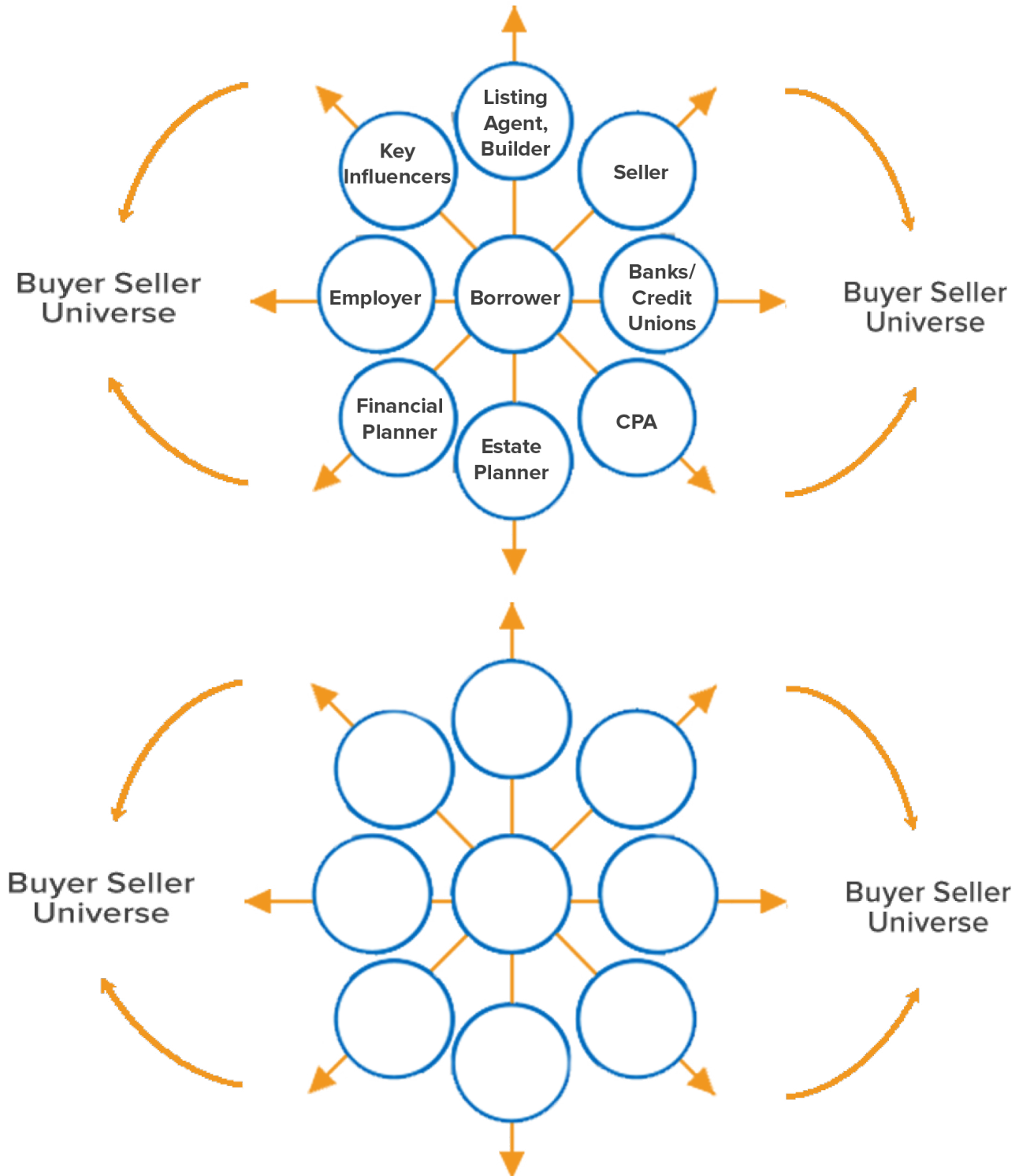


#2: How to 8X Your Referrals with the Circle of Cash Flow

"In 2013, I funded 34 units for 7.8 million in purchase loans. In 2014, I funded 152 units for 34 million in purchase loans. That's 500% growth in under 12-months. I am officially a #toddduncanstudent4life "

- Denise Donoghue

The Circle of Cash Flow™ - Building Real Wealth



Best Script to Turn Every Loan Into More Referrals

“My team and I spend 90% of our week making sure everything goes smoothly for families like you while financing their real estate. The only way we can afford to do that is if you introduce us to friends and family you may know who might also need financing in the next few months or even years. If you’ve learned a lot today and had a great experience, we’d be grateful if you’d connect us with whomever you know that would also benefit from learning what we went over today and getting a custom analysis for their own situation.”

“We’re going to send you a Facebook Friend request to make sure to stay in touch. We post pertinent information about interest rates, guidelines and other valuable information and it would be good for you to see that as we proceed.

If you could do us a huge favor and post something about our meeting today and tag us, this would allow your friends to contact us directly, should they want to learn more about home financing.”

A Simple Approach Call

Hello Mr. Financial Advisor,

My name is _____ and we have a mutual client, Mr. and Mrs. _____. I am their mortgage banker and working on their home loan. I wanted to make sure this 30-year loan aligns with their short and long-term financial goals. Would it be all right if I run this by you real quick?

I meet with many clients that do not have a retirement plan in place or often have old 401ks sitting at prior employers. They often need a referral to a financial planner. I would like to schedule a time for us to visit next week so I could learn more about your business and products you have to offer, and see if we might form a professional partnership. What day next week works best for you?

3. Do These 4 Things and Don't Do These 7 Things and Gain 5-Star Ratings and Referrals on Every Deal!

"Since attending Sales Mastery over ten years ago I have never had a year where my existing clients (repeat and referred) have generated less than \$500,000 in annual revenue. - Calum Ross

The 4 things you must do to succeed:

1. _____ new customers.
2. _____ that customer’s purchase and service experience.

3. _____ and _____ that customer for repeat business
Increase the value of those customers by engaging them to actively attract new customers!

4. _____ the value of those customers by _____ them to
_____ new customers!

The Power of One-To-One Referrals:

- Cost little to nothing to acquire
- Trust you faster
- Decide on you more quickly
- Negotiate less
- Shop other options less
- Are lower maintenance
- Repurchase more often
- Refer you more regularly
- Eliminate the need for costly ineffective marketing

Don't be Guilty of These 7 Deadly Sins

1. Asked for same document more than once __.____ Stars
2. Unexpected rates and fees __.____ Stars
3. Experienced problems __.____ Stars
4. Borrower had to call for updates __.____ Stars
5. No contact prior to closing __.____ Stars
6. No checklist provided __.____ Stars
7. Unresolved problems __.____ Stars

Source: Stratmor/MortgageSAT



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- \$745 Registration Fee - **\$250 Off** Retail Ticket Price
- Free Upgrade to your ticket. Your ticket will be upgraded to include 2018 Digital Access (**\$200 value**) for free!
- Early registrants will be given access to Todd Duncan's Exclusive Video Series, 5 Steps to Unlocking Your Potential. This 5-Part Pre-Sales Mastery Video Series is designed to prepare your team to be ready for a Game Changing transformation. (**\$500 Value**)

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