1. List your target clients!

Make a list of 25 potential clients that will be your initial target. This is a quick fire list ... go with what comes to mind. Think about people you know or people who you COULD contact through a third party. Manufacturers, hotels, restaurants, car dealerships, funeral homes, golf courses, spas, retail stores, apartment complexes, grocery stores, medical offices, gas stations. Any employer or commercial property owner.

Resources: Solutions by Industry

2. Connect with them, over and over again until it works!

Connect with them on social media (Facebook preferred). Call and email. A few days later, repeat. If you have any people in common, call that person, and ask them to reach out (i.e., "Hey, I was trying to get ahold of Doug, but I think they are super busy over there, would you mind dropping him a text and give him my number…. Maybe I have a bad number for him...")

Resources: Scripts, Email Templates

3. Nail your elevator pitch!

First things first, write one using the excellent resource we've built. Second, practice it over and over again until it's smooth. Third, get on the phone and put it to use!

Pro Tip: Authenticity is key. Make sure your elevator pitch sounds like you.

Resources: Elevator Pitch Worksheet, Elevator Pitch Video Training

4. Close existing client cards

Login to the portal and go to the My Clients page. If you have any clients in Cost Seg, start with the guided experience. Call and email each client in the list.

If not, focus on your orange and yellow boxes. Open each client's card and use the pre-made templates to email your clients.

Pro tip: Know your goal! If you need documents, all of your messaging should be about "that one document you need to get real quick". If you have documents, all your messaging should be about them clicking activate so you can get started saving them money!

Resources: Cost Seg Guided Experience, Where can I find my client's activation link?