Guardian U

Elevator Talk

FR Guide

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Introduction

The purpose of an elevator talk is to give someone a quick overview of what you do, and pique their interest enough so that they want to learn more. Elevator speeches should be adjusted to the person who is listening and be refined as you and your practice evolve. This is intended to be a commercial, not your entire professional biography, so make sure to keep it short and sweet.

the window of opportunity to execute an elevator talk is very brief, usually 30 seconds to a minute. Maybe it's at a party, a networking opportunity or on an actual elevator. In any case, you have a short time to present who you are and motivate the prospect to want to learn more.

This guide will help you to:

- Understand the purpose and structure of an Elevator Talk.
- Select appropriate Elevator Talk scripts.
- Create and deliver an effective Elevator Talk.
- Take appropriate follow-up action at the conclusion of your Elevator Talk.

Elevator Talk Structure

The Elevator Talk is a skill that will help you generate more prospects and lead to more Philosophy Meetings (Open Talks). Although similar to the Open Talk, the Elevator Talk is much shorter with only 5 total steps:

1. Transition
2. Problems
3. Solutions
4. Results
5. Action

Step	Suggested Approaches
Transition	No matter what you are doing, or what the conversation was about, there is an effective way to transition from the previous topic, to talking about your business and how it can help the prospect. One effective method is to ask the prospect about their business, or what they do for a living. Most people will eventually reciprocate and ask about your business.
Problems	Always begin with other people's problems. You don't want to put the prospect on the defensive by using their problems. Eventually, further into the process you can talk about their problems, but only after they have given you permission. Rules about Problems: 1. They should be problems that the prospect can relate to. 2. They should be unique problems or presented in a new and interesting way. Usually, the Problem will begin with a phrase like, "You know how people…"
Solutions	Avoid talking about products or planning software as the solution. Instead, the solution should be a concise statement of how you can help the prospect. This is the opportunity to sell yourself, your team, your organization, trust. Usually, the Solution will begin with a phrase like, "Well, I help people to…".
Results	Give examples of the good things that can happen as results of working with you, your team and/or your organization. Usually, the Results will begin with a phrase like, "And as a result, my clients…"
Action	Whatever action is taken, it should result in a plan of follow-up. The plan could be a call, an email, a letter or an appointment. The Action step might begin with a phrase like, "So what is your preferred method of communication?" Or, "Would you be open to exchanging contact information in our phones?" Or, "Do you have a business card?"

Elevator Talk Examples

This guide includes sample Elevator Talk language for the following networking/prospecting situations:

Focus on Financial Issues

- Protection First
- Financial Organization
- Secure Retirement
- Traditional Planning
- Trouble Finding Time

Focus on Specific Markets

- Women's Market
- Small Business Owners

Elevator Talk Examples that Focus on Financial Issues

Issue	Examples
Protection First	Do you know how people can be blind to their greatest areas of financial exposure because they have not had a conversation around proper protection planning? This can create anxiety not only for them, but especially for those who rely on them. When I work with clients, I make sure to first address their full insurance portfolio – even in areas where I don't get paid. We discuss all areas of exposure and determine a plan to fill those gaps. As a result, clients can confidently plan for the future knowing that what might happen today is thoroughly and professionally covered. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Would you be open to exchanging contact information in our phones so we can connect?
Secure Retirement	With questions around the future of Social Security and the fluctuating financial markets, many people today are concerned about the prospect of having enough money for retirement without exposing themselves to too much risk. I help my clients examine their retirement plans and identify opportunities to create more retirement income by evaluating their financial decisions, reducing taxes, and mitigating risk. As a result, my clients find financial confidence knowing their retirement goals are within reach. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Would you be open to exchanging contact information in our phones so we can connect?

Issue	Examples
Financial Organization	Do you know how some people have multiple accounts held at a variety of institutions, and can get overwhelmed by their state of financial disorganization? This can lead to stress and missed financial opportunities. Using **The Living Balance Sheet**® *client servicing system, I help my clients organize their financial situation and take steps towards achieving financial balance. This web-based tool allows them to have access to their own client website where they can link accounts, store critical financial documents, and view their full financial picture in one place. As a result, clients save time and worry and capitalize on the benefits of making financial decisions with the whole picture in mind. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Are you on LinkedIn? Could we get connected so that I can contact you?
Traditional Planning	Do you know how some people today are unaware of the limitations and flaws in a traditional financial planning approach? Traditional planning involves guesswork that can create incorrect goals, promotes risk, and often ignores critical protection needs. In my practice, I provide an uncommon view that challenges traditional thinking and offers a refreshingly new approach to financial decision making. We begin by organizing your balance sheet and then add in your protection and cash flow decisions to create a wide-angle view of your financial decisions. As a result, my clients vastly improve the quality of their financial decisions and bring more clarity, confidence and opportunity to their lives. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Would you be open to exchanging contact information in our phones so we can connect?
Trouble Finding Time	Many people today are anxious because they are so busy with work and family that they have trouble finding time to take a step back and look at their financial picture. Using my proprietary planning process, I help my clients create a Financial Balance Scorecard that helps them organize their financial situation and take steps towards achieving financial balance. This allows them to make financial decisions in a new way....by following common sense rules that are not common practice. As a result, my clients vastly improve the quality of their financial decisions and bring more clarity, confidence and opportunity to their lives. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Would you be open to exchanging contact information in our phones so we can connect?

Elevator Talk Examples that Focus on Specific Markets

Issue	Examples
Women's Market	Do you know how some people like to share their opinions about money and investments – even if they have little understanding of the other person's financial situation? In my practice, I provide a refreshingly new approach to financial decision making – one that's based on objective data rather than opinions. We begin by organizing your balance sheet and then add in your protection and cash flow decisions to create a wide-angle view of your financial situation. As a result, my clients feel a sense of financial empowerment and are at ease knowing they have taken the proper steps to secure their financial future. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Would you be open to exchanging contact information in our phones so we can connect?
Small Business Owners	Do you know how some small business owners find themselves so consumed with the demands of running a business that they do not take the time to step back and be strategic about their finances? In my practice, I address the unique financial challenges that come with owning a business – understanding the wealth of planning options available to them, providing for their needs today, and preparing them to properly transition their business when the time is right. As a result, my clients can focus on their important work knowing that they have a professional keeping an eye on their financial picture. I'd love to schedule a quick phone call where we can discuss this in a little more detail. Are you on LinkedIn? Could we get connected so that I can contact you?

Contacts

For Guardian U

Contact the Guardian U Training Support team at Training_Support@glic.com

For Agency Marketing

Contact the Agency Marketing team at Agency_Marketing@glic.com

Resources

All materials are available through The Framework on Guardian U. **(Guardian U >> Market Development >> Create Your Elevator Talk)**