

The art of doing your research

What's the difference between a poor first-time connect and a successful one?
One word: research

Researching prospects before your first email or call to them can make a world of difference. By understanding the background of the person you're trying to speak to, you can better frame a conversation and stand out from all the other financial professionals that are reaching out to that client as well.

It's important you take the time to collect information and then create a more tailored experience from first touch. By creating relevancy, you're much more likely to engage the client and have a positive, meaningful conversation.

1

LinkedIn – Use the professional tool to find out additional information as well as to see if you have connections with the same people that could possibly give you a professional introduction.

2

Social media – Facebook, Twitter, Instagram, Pinterest, etc.

3

Google – Use Boolean searches to narrow the focus of your search or see if the prospect's name is a common one. Boolean searches rely on specific modifiers to help you find results more closely related to the types of profiles you need to find. You can build search strings in the Keywords, Title, Name and Company fields. The modifiers you can include are quotes, parentheses, AND, OR and NOT (see examples below).

Boolean searches

"John Doe" + donor + donations + Birmingham

"John Doe" + sales + articles + Birmingham

Not a deposit
Not FDIC-insured
Not insured by any federal government agency
Not guaranteed by any bank or savings association
May go down in value

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