

## Follow-Up with an Individual Planning Session (IPS)

At some point in the Circular Prospecting Process your prospects are going to want to know how becoming a customer or an Associate can work to help them reach their health and prosperity goals. Sit down with your prospects and your Up-Team leader and conduct an IPS.



Everything you do in the Circular Prospecting Process is leading to this point. By now, your prospects have had a number of exposures to Univera, including videos, events, talking to other team members, samples of Xtra or another product, and you have learned about your prospects in the FORE conversation. Now it's time to pull it all together and show them how it can all work.

Now here's the important thing:

**THE IPS IS ALL ABOUT THEM.**

Your job is to ask them questions, listen to the responses, and show them how to achieve their goals. Don't make the mistake of thinking of this as "closing". What you are really doing is continuing to open and lead the prospects into the next step of achieving their own dreams. You are their coach, tour guide, and partner.

**DISCOVERY**

Find out why they are engaging in Univera, either as a customer or an Associate. What do they want to achieve? Ask questions like, “if you could wave a magic wand and design the perfect life, what would it look like?” or, “if you could paint a picture of what your life would look like 5 years from now, what would the picture have in it?” Dig deep and discover the prospects’ personal “why”. What do they really want? Remember to seek clarification, keep asking questions, listen closely, and be certain to get down to what really motivates your prospects.

Next, put a timeline on it. Find out when they would like to achieve their goals. For example, if they say their why is to be able to provide their families with more, ask something like, “so, when would you like to have your kids enrolled in private school, next year or 5 years from now?” Or if your prospects’ goal is something concrete, like owning a boat, ask, “do you want a 22’ ski boat or a 65’ yacht? Do you want to have it in 2 years or 10?”. Get specific so you can help your prospects lay out a realistic schedule to achieve their dreams.

## FIRST STEPS

Develop a Plan to achieve your prospects’ goals in the timeframe they want. This is determined by how many prospects they see and how long they take to do it. This will determine how fast your prospects reach ranks, how much they earn monthly, and how much of the bonuses and incentives they collect. This is where most people fool themselves. When people begin to track their prospecting activity, they are often surprised to find they stopped prospecting too soon, and often believe they have found their four duplicating Associates before they really have.

For Associates who want to reach a 7-figure income level in their first 12-months, we teach a strategy of taking 60 people through the Circular Prospecting Process in a 90 day period of time. On average, this will result in about 20 who become customers and about 4 who will become duplicating, business building Associates.

## ACTIVITY

The steps to take include having a list of prospects sufficient enough to have at least 60 who will complete the process. If your prospects have no warm market, it will be necessary for them to work in a cold market, finding prospects in meet-up groups, networking associations, and other ways of meeting new people. It’s a little harder, may take longer and need higher numbers, but it can definitely be done.

Put the events on your prospects calendars. The Tuesday evening Leadership WebEx is not optional, it sets the pace, teaches how to hold an Xplore Univera presentation, provides current and relevant information weekly, directly from a

Corporate Executive, and concludes with a targeted and top quality training segment delivered only by high achieving, successful Associates.

If there is a live Leadership Team event anywhere within your geographic region, regular attendance and participation is the best way to stay close to the fire and keep your Associates from losing the vision. Finally is the big event. This includes the monthly Leadership event in Seattle, any Regional Conference and the biggest event of the year, National Convention.

A leader's role is to initiate activity, so part of your job is to sit down with your new partner and begin making phone calls and setting appointments. This is a business of leading by example. Don't expect your new Associate to do anything you are not personally willing to do yourself.

Now, it's just a matter of helping your Associates engage in taking their prospects through the Circular Prospecting Process in sufficient numbers, in a short enough period, to create and then sustain momentum in their businesses. This is a simple and fun business that should be treated like a team sport.

The best tool available to help you and your new Associates succeed is the High Touch / High Tech system available under the "Power Builder" Tab on the [www.Leadership-Movement.com](http://www.Leadership-Movement.com) website.