

11th Edition

Building a Financial Services Clientele

The Ultimate Guide to the One Card System



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OCS
One Card System

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Building a Financial Services Clientele O. Alfred Granum,Barry Alberstein,Delia Alberstein,2016 This new 12th edition contains some of the most important updates ever made to this highly popular publication This edition of Building a Financial Services Clientele brings the proven One Card System OCS to life in a contemporary high tech context penetrating the mechanics of the system itself to expose why the approach works and how you can take advantage of today s tools and technology while still employing the remarkably effective OCS system This edition provides step by step instructions on how to Understand the client building philosophy Use Social Media for improved prospecting Conduct an effective fact finding interview Use Activity and Efficiency Points to Stay on Track Use the CAM System Understand the consultative sales cycle Enhancements to the 12th Edition New Chapter Understanding the Science of Building a Clientele New discussion of the importance of and how to stay focused Complete update of the relationship of technology and the One Card System including discussion of technological tools benefits of technology networking and social media Increased emphasis on soft skills including client research and physiological value of new clients client guidance and loyalty Enhanced treatment of Client Acquisition Process Enhanced treatment of managing time and relationships CAM Career Activity Management System chapter entirely updated Mastering the Client Acquisition Process Expanded instruction in identification of Qualified Suspects and turning them to Clients Updating of useful tools for increasing industry knowledge and skills Scripts for the six step prospecting approach to gaining more clients Tips and scripts for use of the telephone mail and email Effective communication techniques for today s producer Tools for customer relationship management and practice management Setting goals and refining work plans Analyzing and managing activity and production Handling the fact finding interview Effective closing techniques Maximizing the value of delivery and post sale contacts Whether you re a beginner or an established professional there is only one proven system that will bring you true success that s the One Card System and this is the book that will help you master these proven techniques **Building a Financial Services Clientele** O. Alfred Granum,Barry Alberstein,Delia Alberstein,2001 **Building a Financial Services Clientele** O. Alfred Granum,2006

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