Talking Points Tips & Tricks

☑ Review their website bio and firm website materials. Have a list of planned questions to ask about them and their firm.

☑ Get them talking about their firm and practice including culture and management philosophy.

☑ Mix up modes for communication – If you don't hear back from an email, connect on LinkedIn – but make sure your LinkedIn profile is current with the Aliant brand! Ask Marketing for help.

☑ Talk about the Why of Aliant – why you joined Aliant, how it's helped you and your clients, share stories of referrals, tell the story of Aliant from a human perspective.

☑ Share how Aliant conveys big brand practice without sacrificing the independence and revenue of a smaller boutique firm.

☑ Share why a firm and a relationship in their region is valuable to Aliant and to your own practice.

☑ Offer to introduce them to others in Aliant who have similar practices or approaches.

☑ Suggest a follow up call with Martha, Aliant's CEOP, or Jacob, the firm's Chairman.

☑ Share the pitch deck and walk through it with them – It tells the Aliant story.

☑ Always schedule the next conversation! Never leave it up to them to follow up with you. Don't say things like 'let's talk next week.' Always be specific – 'let's speak next Tuesday at 3pm.'

☑ Find ways to demonstrate Aliant's value – invite good prospects to participate in a practice group meeting, engage them in a scheduled marketing committee meeting to show how the team works together.