

# BPM BEST PRACTICES

## STEP 1: INVITE TO BPM

Invite to BPM by utilizing the invitation scripts. TETHOR or Advanced Scripts as appropriate.

## STEP 2: REGISTER

Go to [bit.ly/TMGguests](https://bit.ly/TMGguests) & follow the prompts to get your guests registered for BPM. Make sure you input their info for them. This allows you to control the point of contact. *Once you have registered your guests, make sure they are added to the BSCPRO BPM Invite Tracker.*

## STEP 3: CONFIRMATION

If your guest will be attending virtually, then they will receive a confirmation email once you have registered as well as one again before that scheduled BPM. If your guest will be attending in-person, then they will only receive a confirmation email 2 hours prior to that scheduled BPM. If you want them to receive a confirmation right away, then you will click the email icon in the BPM Invite Tracker once you have added them to BSCPRO.

*The best rule of thumb is to confirm immediately after booking them for the BPM. Then remind guests 24 hours before, and 30 minutes before each BPM.*

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## STEP 4: CHECK-IN

During BPM, check-in your guest on BSCPRO. Update the BPM Invite Tracker to reflect if they showed up or need to reschedule.

## STEP 5: FOLLOW-UP

Did they show up to BPM?

- Yes: Keep things simple, DO NOT ask open-ended questions or try to over explain. Example- *"Wasn't that great information!?"*
  - *If they enjoyed, and want to become a client: **BOOK FNA***
  - *If they enjoyed, and want to join the team: **BOOK HIRING INTERVIEW***
  - *If they enjoyed, but did not want to do either: Great! **Ask for some referrals.***
- No: Contact them to figure out why and reschedule them within 24-48 hours.

Remember the fortune is in the follow up and your only goal is to BAMFAM (*Book a Meeting From a Meeting*).

## STEP 6: UPDATE BSCPRO

*Keep track of what happened with your guest!*

- If they want to book an appointment, use the arrow button on your BPM invite list and click to submit a matchup.
- If they want to reschedule, use the arrow button on your BPM invite list and click to reschedule.
- Use the highlighter feature to indicate their status.
- Add notes so you can remember what happened with each prospect!

# BPM INVITE SCRIPTS

*The purpose of the meeting is to introduce our company, what we do, and our mission to help 20 million families.*

## For the agent still in training:

**T** TIME  
But hey... What are you doing this Tuesday at 6pm PST?

**E** EXCITED  
Awesome!! I'm super **excited** because I just got started with The Miliare Group.

**T** TRAINING  
I'm in the **training** phase right now.

**H** HELP  
And I was wondering if you'd be willing to **help** me out.

**O** OPINION  
I really value your **opinion**...

**R** REFERRAL  
I want you to check out what I'm doing, because you may be a good **referral** source down the road!

## For the seasoned agent:

**1** MARKET THE OPPORTUNITY  
*Share with the prospect why you got started here.*

**2** GET THEIR ATTENTION  
*Determine whether the prospects are open to a new business opportunity. Find out what things are important to them.*

**3** BRIEFLY EXPLAIN  
*Tell them who we are and our mission to help families build & protect their wealth.*

**4** EXTEND THE INVITATION  
*The meeting will allow them to: Learn about and see the impact of the opportunity.*

**5** GET A COMMITMENT  
*Let prospects know the days and times for the next two BPMs and get a commitment for the one that is best for them.*

**6** PUT THEM AT EASE  
*Pre-frame the purpose of the meeting is to simply provide an introduction to who we are.*

# OBJECTION HANDLING

Occasionally, in the course of the invitation, the prospect may begin to ask questions such as:

- “What is it?”
- “What are you selling?”
- “Before I come, I’d like to know more.”

To keep the positive momentum of the invitation, you should have a few responses in mind.

- It’s super visual I couldn’t explain it over the phone even if I tried.
- I’ll tell you when I show you!
- We teach families how to grow and protect their wealth.
- I’m still in training so I don’t wanna butcher it for you, my partner can explain it much better than I can!”
- We teach families how to make and save more money.
- Whether it sparks your interest or not, you may know someone that I can help.

Remind them of the purpose of the meeting to help put them at ease.

- The purpose of the meeting is to introduce our company, what we do, and our mission to help 20 million families.

If the prospect doesn’t want to attend the meeting, try to set up an appointment for a personal BMP instead.