



# the intro machine

## NAIFA 2023: Becoming An Introduction Machine

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# BECOMING an INTRODUCTION MACHINE

*How to Build An Introduction Based  
Business In Under 90 Days*

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# I Literally Wrote the Book



Open Me



# GRANUM DEFINITION of a QUALIFIED SUSPECT

An entity that could be a person, a business, or an organization. This entity has enough going for it that you “suspect” it is worth pursuing. That is, you have sized up the entity (through your eyes or those of a nominator) and believe you can turn them into a “prospect”. Without the following information you only have a “name” and you do not have a Qualified Suspect.

- Name & Age
- Number and address
- Occupation and Title
- Approximate income

*SOURCE: Building a Financial Services Clientele*

# INTRODUCTION

A formal personal presentation of one person to another or others

*Source: dictionary.com*

## Definition vs. Connotation

# GOAL!

To become an

# Introduction Machine

([www.TheIntroMachine.com](http://www.TheIntroMachine.com))

# SUCCESS THRESHOLDS

**30+** per week (Up To MDRT)

**20** per week (MDRT But Under Court of Table)

**5** per week (COT+ Producers)

# CONCEPTS

1. Capitalism
2. Calculating Value
3. Law of Large Numbers
4. SOP

# CAPITALISM

“an economic system in which ...exchange of wealth is made and maintained chiefly by private individuals or corporations, especially as contrasted to cooperatively or state-owned.”

*Source: dictionary.com*

A dynamic system of free exchange of items or services of value for profit

~JRRT~

# APPROACH

“Are you a Capitalist? I am....”

“As a fellow Capitalist, do you believe...”

“Are you familiar with the term *pro bono*?”

**IF/THEN** Statement (Boolean Logic)

**NB: ALWAYS DISCUSS COMPENSATION UP FRONT!!!**

# CALCULATION OF VALUE

What are you worth per hour?

What is an Introduction worth?

Do you leave \$100 Bills on the table?

# CALCULATION OF VALUE

$$\begin{aligned}\text{Hourly Rate} &= \text{Compensation} / \text{Time}^* \\ &= \$200\text{k} / 2000 \text{ hours}^* \\ &= \$100/\text{hr}\end{aligned}$$

\*What is your Face Time %  
(Utilization Rate)?

# CALCULATION OF VALUE

Yearly Earnings/Introductions per Year =  
**Value per Intro**

(\$200,000/year) / (500 Intro/Yr) =  
**\$400 PER INTRO**

...1 more intro/day → **\$100K**

# CALCULATION OF VALUE

Lessons Learned:

Introductions are valuable.

Your time is valuable.

Invest Time

To Earn Intros

To Build Business!

# COOL TOOL I USE NOW



SCAN ME

# LAW OF LARGE NUMBERS

Insurance is actuarially based.  
Shouldn't your business?

**10 : 3 : 1 Granum Ratio**

**8 : 3 : 1 Full Planning Ratio**

502 Plate Appearances to  
qualify for Batting Title.

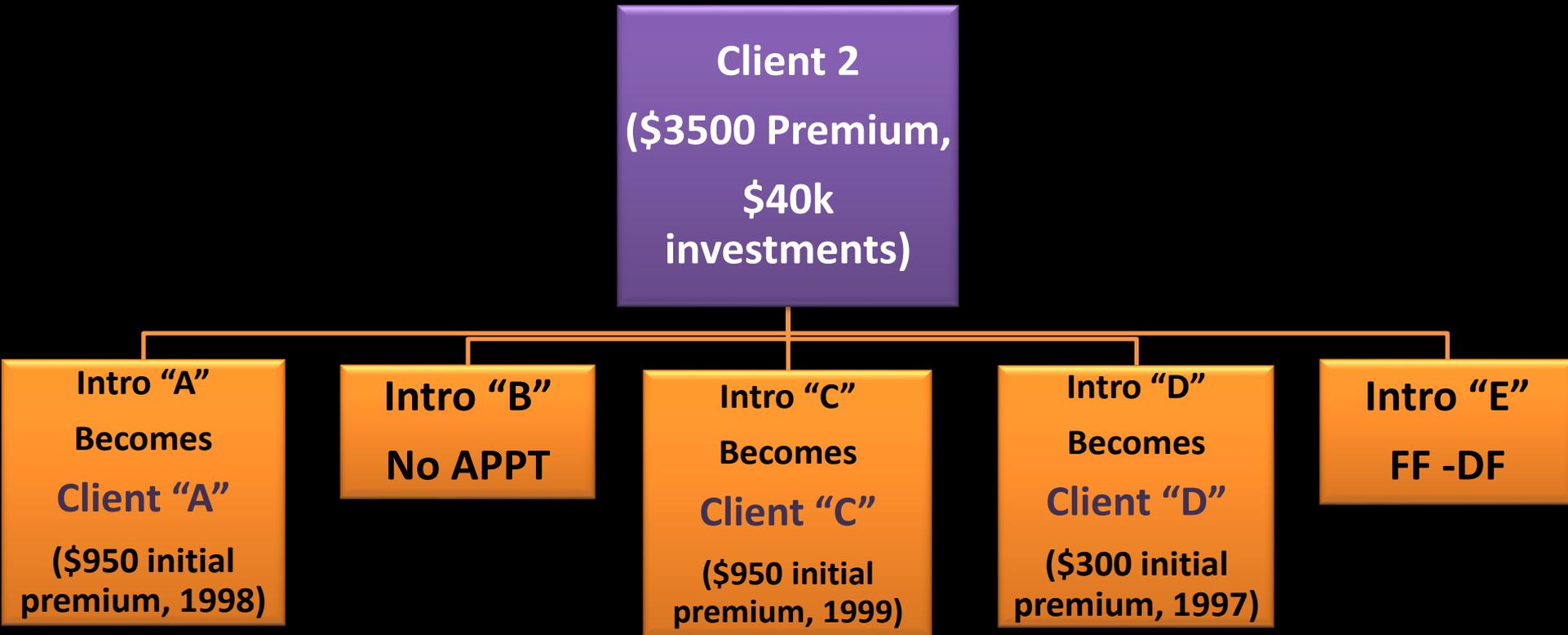


# LAW OF LARGE NUMBERS

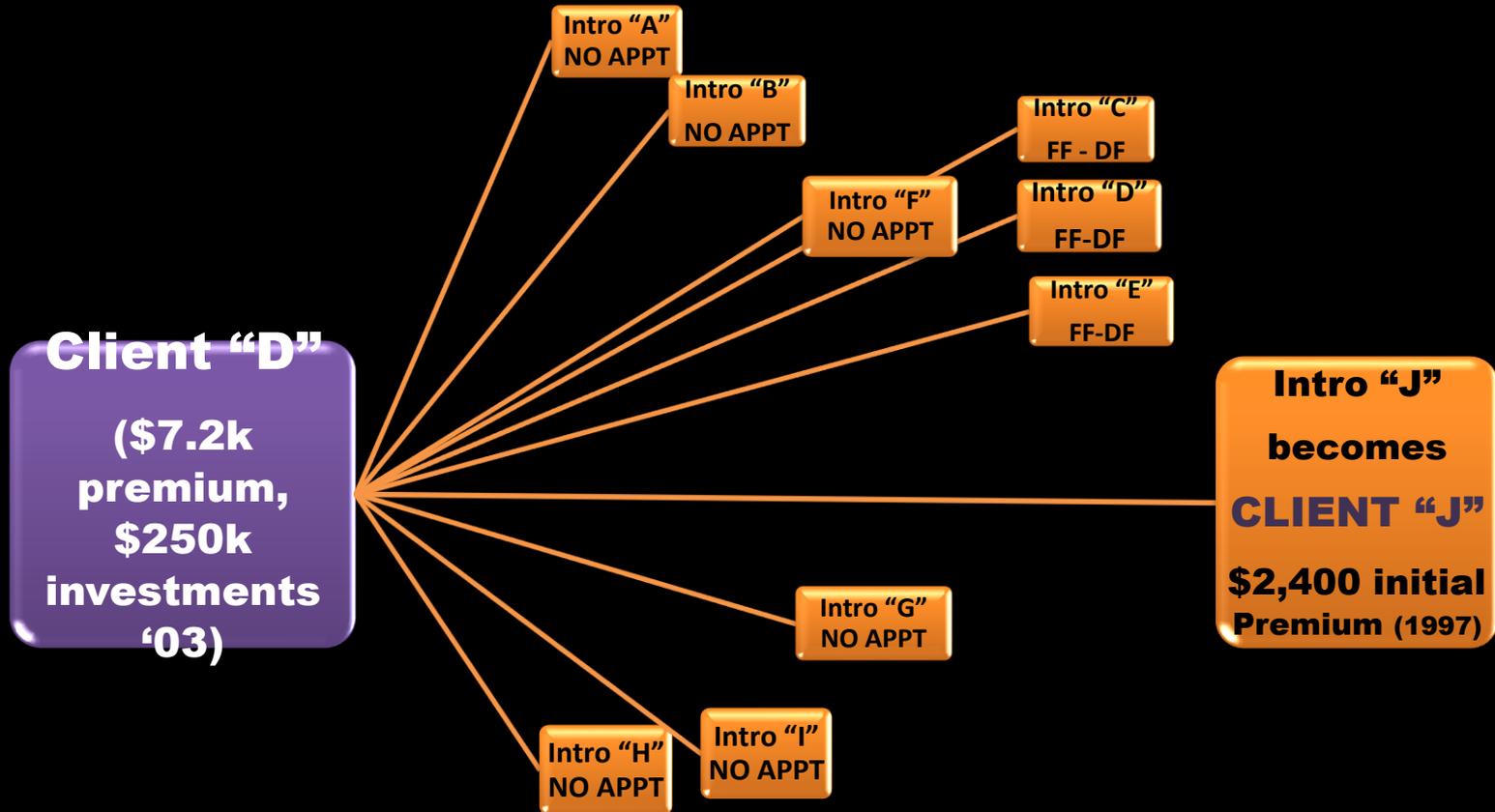
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# LAW OF LARGE NUMBERS



# LAW OF LARGE NUMBERS



# LAW OF LARGE NUMBERS

CLIENT "J"

\$700+K PREMIUM

\$100K Planning Fees

\$60m+ AUM

IN 2004/2005, 2022

# LAW OF LARGE NUMBERS

## Lessons:

You never know on any intro.  
Activity lets probability work.  
Large Cases take long time.

# SOP

Standard Operating Procedure!

The way we do it.

Ensures consistent quality.

The spirit is willing...

# SOP

- Initial Meeting
- Phoning Process
- Confirmation Process
- Agenda
- R&D
- Sales Cycle (Approach, FF, Discovery Agreement, Introduction Gathering)
- **Use of Staff & Tech**

# SOP

## AGENDA: FIRST MEETING

- 1. Introductions**
- 2. Overview of Process**
- 3. Mutual Expectations**
- 4. Information Gathering**
  - a. Facts**
  - b. Feelings**
  - c. Philosophies**
- 5. Clarification of Goals and Objectives**
- 6. Red Flags**
- 7. Favorable Introductions**
- 8. Next Appointment:**  
**Expected Time of Meeting: 90 minutes.**

# SOP

## AGENDA: PRESENTATION MEETING

- 1. Review of Goals and Objectives**
- 2. Review of Analysis**
- 3. Recommendations**
- 4. Implementation Decision:**
  - a. Yes**
  - b. No**
  - c. Need Additional Information:**
- 5. Execution Steps**
- 6. Favorable Introductions**
- 7. Next Appointment:**

**Expected Time of Meeting: 90 minutes.**

# SOP

## Introductions

- TELL them you will ask (Approach et al)
- EARN the right to ask (FF, Presentation, Service, etc)
- ASK!
- Make it EASY!
  - a. Lists
  - b. Orange Car
  - c. Cell Phone
- Repeat Cycle.
- Tighter criteria at each \$100k production

# SOP

R&D = Cyber Stalking

Google

Facebook

Linkedin

Cell Phone Snap

Phone Tree

# IN CONCLUSION

We are the only ones that bring peace of mind and stability in this chaos.

Introductions are how you get paid and build an IBB. Court of the Table+ or bust.

2023 is the year to invest in yourself and 2x your biz.

# THANK YOU!



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