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Your Ultimate Resource In Life Brokerage

Ending With A "Wow" Experience

This last April, I indulged my inner conference junkie and attended one that gave me a whole new world of ideas. If you haven't yet attended an Infusionsoft conference, I fully recommend that you mark your calendar for the next ICON in 2015.

At this event, besides gaining some revolutionary ideas for our own company, we also saw a few that we'd love to pass on for future use in yours. Our main goal over the next few months is to give you, the advisor, the keys to the new Lifecycle Marketing Model to help you attract clients, move clients through the sales tunnel, and give your clients a "wow" experience.

"...Coming back from ICON2014 doesn't just mean a belly full of the world's best pizza and Mexican food..." It's coming back with a mind full of new ideas."

The first phase, of course, is attracting new clients. To do this, you must acquire a target audience, educate them, and then communicate with them specifically in their niche according to their strengths and weaknesses.

Phase two of the Lifecycle Marketing Model is the selling phase. If you've been doing phase one correctly, you should be

able to eventually educate your client until they buy. That means letting your clients get to know you, making a specific offer, and then closing the deal.

Finally, phase three is the delivery phase. Here, the tables have turned on you as the seller to give back to the client. That means asking yourself what more you can offer. What is something unexpected you can surprise them with so you can create a "wow" experience? After all, referrals are important, and achieving an above-and-beyond customer experience is the best way to score some great new clientele.

Interestingly, we didn't have to rely on the Lifecycle Marketing Model presentation at the conference to bring the ideas home in a personal way. On our first night in Phoenix, my wife, Jami, and I went across the street from our hotel to Pizzeria Bianco, which proclaimed itself to have the best pizza in America. We have always loved eating at local restaurants and this was no exception. Based on how delicious that pizza was (and we ordered three kinds—the Wise Guy Sausage, the Bianco Verde Vegetarian, and the Sonny Boy with fresh salami), the guys there could have offered us anything and we would have bought it. Now that's what you call a delivery phase! It didn't end there, though. The next night, we got in a cab, looking to find some great Mexican food, but when we told our driver where we wanted to go, he told us he had a better place in mind—the Barrio Café. Then he gave us the offer of a lifetime. He told us that if we didn't like the food, he'd come back and pay our bill for us.



Needless to say, we couldn't pass that one up, and we were glad we didn't. What a fantastic recommendation! The seafood enchiladas were wonderful, as were the fish tacos and tasty guacamole. It was a "wow" experience we'll be talking about for years.

Of course, coming back from ICON2014 doesn't just mean a belly full of the world's best pizza and Mexican food. It's coming back with a mind full of new ideas. If you're ready to take your business the next level, don't take it from me that the Lifecycle

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An Introduction To The Field

Outdoorsmen come in all forms, from the Poseidon-like fishermen who flick their lines over wandering rivers to the hunters and hikers who brave the bite of the chilly morning air to scale a ridge in search of wildlife. But among these common outdoor games is one we bet you won't recognize: field trialing. Dating back to the 1800s, this fascinating, artful sport is a combination of man and animal partnership and classic hunting techniques

How it works:

Dogs and their handlers compete in stakes, two at a time. Each stake is comprised of two dogs, two handlers, two judges, and two scouts. All men and women are on horseback. The dogs run for 30 minutes to an hour depending on their event. During that time, they race through the field, tracking until they find a bird that has been hidden on the course. Once they go on point, they must stay still while the handler dismounts, flushes the bird, and fires a blank. They will do this as many times as possible in the time they are given. Halfway through the course, the judges will switch, so that both handlers get equal time with each judge. If the dog does well, he or she may be given a call back at the end of the competition. At this time, a shooter stands at the edge of the course and shoots the bird that is pointed and flushed. The dog then retrieves the bird and brings it to the handler. Depending

on the number of dogs and handlers taking part, a trial can last anywhere from hours to days.

How it's judged:

In field trialing, a dog is judged on several criteria. First is speed. The dog must not be behind the judge. Rather, he or she should be racing across the course. Second is the dog's ability to point, and hold on point, until given the signal to move. Third is how many birds the dog is able to point. Fourth is the dog's ability to retrieve a bird in a call back. Dogs can become Field Champions by obtaining 10 points and one major (a major stake event requires 13 dogs). Points are determined based on the number of dogs competing. Dogs may also become Dual Champions when they compete in the show ring as well as the field.



sudoku answer key

3	4	5	6	8	7	2	1	9
2	8	6	9	1	5	4	7	3
7	1	9	2	4	3	5	8	6
8	7	2	5	9	4	3	6	1
1	6	4	3	7	2	8	9	5
9	5	3	1	6	8	7	4	2
4	3	1	7	5	9	6	2	8
6	2	8	4	3	1	9	5	7
5	9	7	8	2	6	1	3	4

Leadership from The Laugh Track

Who doesn't love Jimmy Fallon? The *Saturday Night Live* comedian just transferred his talents to the *Tonight Show*, and while he's known for his laugh-inducing antics, Fallon's smooth operation of his new gig makes him a leading legend—or at least a guy to take a few cues from!

The *Tonight Show* has been a staple of American television since 1954, and iconic chin wagger, Jay Leno, had been captain of the ship for about 17 years. With Leno's retirement, many were unconvinced that the much younger Fallon could fill his considerable shoes. Fast forward just a couple of months, and Fallon's hijinks have garnered the highest May sweeps ratings in five years! So, how can Fallon's small screen victory get better results for you?

ACT NATURAL: Fallon didn't reinvent himself just for the *Tonight Show*, instead, he kept the same style and conversational mojo he'd honed on his other gigs. Instead of modifying his act to conform to 60 years of *Tonight Show* history, Fallon was quintessentially himself and didn't change his tactics just to fit—remember, they hired Jimmy Fallon, not Jimmy Fallon as Jay Leno. When you make a change, it's easy to think that the obvious move is to highlight the newness, excitement, and

amazing nature of your presence. But, the best things to do is be you!

R-E-S-P-E-C-T: While he is certainly taking the *Tonight Show* in a new direction, Fallon is still making sure to keep well-loved traditions alive. Leno's sidekick, band, and desk, are all the same, but with his touch, they certainly aren't same and old. Making what is old hat seem new is a challenge on and off screen, but the key is to keep those elements that really matter to you and your clients. This is essential to any transition and it doesn't take a celebrity to add a level of flair to what's tried and true. Build off a great legacy by honoring and enhancing what has proven itself.

SHARE THE SPOTLIGHT: In the midst of welcoming a new host, the *Tonight Show* always has a bevy of guests and personalities that make each evening special. Instead of just sitting behind the desk and asking questions, Fallon makes sure that each new face



is actively involved in the show. For the comedian, this comes out as a re-enactment of *Footloose* with Kevin Bacon, or a hip-hop dance history with Will Smith. In your own office, it can be as simple as including more people in planning meetings, or outings. Maybe it's a bit more dramatic and includes having more hands on deck in the creation of a new product. No matter what it looks like, turn a solo act into a team event to see greater success all around.

COVER CONTINUED

Marketing Model works. After all, once upon a time (back in 2006), Infusionsoft had six employees and a first conference of 200 people. Now, eight years later, they have 450 employees and 3,500 conference attendees. Everyone's drinking their Kool-Aid and walking away feeling hyped. Our company is no exception.

Here at Unified Insurance Network, we've been busy taking the lessons to heart. Today, we are more passionate about the art of our business, more knowledgeable about the science of perfecting business, and more proficient at giving the personal touch. Our campaign toward giving every part of the business the human touch, has even led us to sending out gifts of our own (we hope you've enjoyed them). We want to help you get to know us, and as you might have guessed, we're starting right here.

— Justin

Making the List

When Craig Newmark set out to meet other techies in San Francisco, he started by emailing his buddies and asking connections. It was 1994, and as his group of friends expanded, did the breadth of topics that he shared. Members of the group began requesting that he pass around job listings and items that were for sale—up until that point, most viewable in the newspaper. By 1995, his number of contacts had hit 250 names and he wanted to make the process more official. Initially, he wanted to call his website Events, but his members already had it named. Since then, if you've ever gone online to sell couch, look for a job, or meet up with a "missed connection," you've probably frequented what is known today as Craigslist.



DID YOU KNOW...



SUDOKU PUZZLE

PUZZLE YOUR BRAIN!

			8	7		1
2	6				4	7
		2	4			8
8	2		9		3	
	6	4	3		2	8
		3		6	7	2
4	3			5	9	
	2	8				9
9		8	2			

The Unavoidable Conversation



Your wealthy clients may be business tycoons or IT lords of innovation, but just because they're smart, doesn't mean they're organized and prepared when it comes to handling finances later on in life or after death. Nudging them toward these discussions can often be difficult and touchy, but there are several tips for making such a conversation easy and pain-free.

1. The Celebrity Example: Your client may not want to talk about themselves when it comes to hashing out what problems could arise without an up-to-date will, so being able to refer back to celebrities who faced similar situations can help break the ice. "Remember Evel Knievel," you can say, "Let me tell you a story about him."

situations can help break the ice. "Remember Evel Knievel," you can say, "Let me tell you a story about him."

2. Keep it Current: If your client is really in love with wife #3, he's going to want her to get his life insurance money—not wife #1. Showing the personal side to these matters may make updating the paperwork a tad easier.

3. Organize Company Finances: Large or small, family businesses can be thrown into turmoil when the owner dies and liquidation has to be done quickly. Create an easy and simple plan that can be followed when and if such a situation arises.

4. Emphasize the Effect: Don't talk about what life insurance is—talk about what it does. If someone says they don't need it, explain its benefits without the words, "When you die..." After all, who doesn't want a solution that takes care of their expenses and saves their business in the event of "just in case."

Source: Steven Morelli. "Strategies for the Rich and Not-So-Famous," *Insurance News Magazine* May 2014

Do Not Walk And Text!

While reading an article by marketing guru, Dan Kennedy, I came across a word I'd never heard before: "feckless." He encouraged his readers to take a peek into a dictionary if they were unfamiliar with the word, and I certainly was so I turned to good old Webster for the answer. "feckless, adjective," it said, "1. ineffective, incompetent futile; 2. having no sense of responsibility, indifferent, lazy." It's a good word, and while one word does not a great thought make, what followed made me take a closer look at how we do business.

Dan mentioned that at a recent trip to Disneyland, he saw a sign that stopped him in his tracks. "For your safety, watch your step, DO NOT WALK AND TEXT!" Is it any wonder he was taken aback? We live in a world where we expect our fellow man to lack responsibility on such an extreme level that we must remind him of common sense at every turn. But what can we do about that as entrepreneurs? For this, Dan says we need to keep the Four R's in our minds. Entrepreneurs must be **R**esponsible, **R**esistant, **R**esourceful, and **R**esilient.

We cannot accept the excuse that there are "circumstances beyond your control" interfering with our ventures, and our words must have follow through (responsibility).

"Everybody does it" is not a good reason to embrace commonly used but poor personal and professional modes of conduct (resist). Entrepreneurs are creators in an environment where the infrastructure and rules just don't exist yet so push that envelope and re-invent your industry (resourcefulness). One slump does not defeat you for success is defined by determination (resilient). Living a feckless life will never deliver the success you want. Instead never forget the Four R's, your future is what you make of it.



AN INSIDE LOOK...