



## The traditional approach vs the ISI approach

It's easy to see how effective the ISI process is compared to the traditional process.

### The opportunity

- Pre-qualified prospects are an opportunity to create an immediate client, based on their interest in meeting with an advisor.
- They have likely identified an amount and possibly a product they want. However, you will find they can be anywhere in the process.
- Take time to understand their expectations so you can provide value to where they are in the process.

### Be sure to:

- Review how they arrived at this need, then educate them in order to optimize their solution in the process. Remember, even a lead that isn't a sale can be an opportunity.
- Do deeper relationship work after the transaction.

