

15 Minutes Colburn Market Interview Process

Notebook: Colburn Agency

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Location: Washington County, Arkansas, United States

- Begin with a few minutes of connecting. Where they come from, location, etc.
- Set clear expectations for the call
 - I appreciate and respect your time today. I have 15 minutes blocked out for our conversation this morning. I know you are busy and I want to respect the time we have for this call.
 - What I would like to accomplish today is to hear a little bit about what interested you in the opportunity with Colburn Financial, Why are you looking for another opportunity, and what intrigued you about us specifically. After we spend some time discussing this I want to tell you a little bit about me and why I started working with Colburn Financial. I'd like to explain our culture and what set's us apart from other opportunities and other agencies in the financial arena. If everything goes well today we will set up another interview that will be an in-depth and detailed dive into exactly what this is and what it isn't. But the purpose today is really geared around making sure that the culture that we have here at Colburn Financial is a good fit for what you are looking for and for what we are needing to continue the growth and success that we have had the last 4 years. So having said that... tell me a little bit about what you are looking for and what intrigued you with Colburn Financial?
- Discuss what they are looking for and make sure that you understand them from a culture stand point.
- Tell you 5 minute story on why you started with Colburn Financial and how important the Culture has been to your success and love for what we do.
- Circle back and let them know that you would like to have another conversation with them.
 - I will be sending you an email after we get off the phone. In it you will have the ability to schedule another 40-minute full interview. What I need you to do before that conversation is to watch another In Depth overview of the IMO (SFG) that we are partnered with. You remember Brad Smith? From the first overview? He is an Associate Partner with Symmetry Financial Group and will be the one that is explaining the details of example what we do in relation to SFG. What I need you to do is watch that video with a little bit of skepticism, not cynicism, and take a lot of notes. I'm asking you this because our next conversation will be you asking me as many questions as you need to, to make sure that you understand example what this is and what this isn't. My hope is that by the end of that conversation you will have one of two decisions to make:
 - One, you love the culture of Colburn Financial and our partnership with SFG AND you feel that this would be a great fit for you moving forward.
 - or Two, you love the culture of Colburn Financial and our partnership with SFG, but you feel that his isn't the right fit for you.
 - Either way we will know pretty clearly what direction that you should take. This all is contingent on making sure that you are prepared for our next conversation by watching the overview and being prepared for our discussion. Do you think that this is something that you can do?
- After the interview make sure you send the email with the link to the In Depth Overview.