

Agent: Hello, this is Wes!

Recruiter: Hey, Wes, this is Mike Colburn with Colburn Financial.

Agent: How are you?

Recruiter: Better than I deserve, to be honest with you. How is the great state of Florida?

(Finish with a small amount of chatting regarding the state and the weather.)

Recruiter: I'm excited to chat with you a little bit. I've got 10-15 minutes here, I've got locked away, and I want to make sure that we're intentional with the time. I know that you're busy, so I want to value your time. I want to layout the expectation of the call. The first half of this call is really to get a good perspective on what it is that you're looking for and why you're looking for a change. What prompted you as far as the Colburn financial? And Why Us?

Then we'll spend the second half of the call talking a little bit about our core values. What drives us as a company. Hopefully, that fits with some of your core values. We've learned that making sure that the core values match what you're looking for is most important. Then we will set up another time to have a more in-depth conversation about the inner workings of what this is and what it isn't.

So Why Us? Why Colburn Financial?

Agent: (Interviewee explains. Your job is to understand what they are saying well enough to rephrase what they are looking for in 2-3 sentences.)

Recruiter: Okay, so it sounds like your looking for... (Rephrase what the interviewee expressed as important to them)

Recruiter: Yeah, that helps a lot! That helps me get a good picture of where you're at in your mindset and what you're looking for in a new partnership. I want to explain three of our four Core Values as a company. I'll leave the fourth one to our next conversation. I want to explain these simply because the core values are what we use to make decisions, and they are the reason why we've had significant

growth over the last four to five years. We've gone from nothing to doing 6 to 7 million dollars of insurance production. These Core Values are also what drives our interactions with our client, our potential business Partnerships, our agents, producers, and the home office.

First Core Value is, "Be Proud of Failure."

(Explain why it is important to you)

The Second Core Value is, "Leave the Jersey in a Better Place."

(Explain why it is important to you)

The Third Core Value is, "Be the Constant, NOT the Variable."

(Explain why it is important to you)

Any thoughts on these three of our four core values?

Agent: (Listen to the explanation and see if they are already living out these values)

Recruiter: Great! Just hearing that short response, I think I understand what you're looking for.

Here is what I'd like to do. Again, I told you this was going to be a concise conversation. I'd like to have a more in-depth, probably 40 to 45-minute conversation. That interview is really to address all the questions that you have.

I'm going to send you an e-mail. There will be several links. The first link will be a follow-up Overview Video. What we call a more in-depth Overview. That overview is going to be done by the Associate Partner that you saw in the first corporate overview, which is Brad Smith. This video isn't going to be a really frilly video. It's going to be very granular, very detailed, here's how it works, here's the IMO that we're partnered with, here's how we make money, here's how the leads work, what the comp plan looks like. All that stuff is going to be laid out.

What I asked you to do is watch it with a pen and paper in hand. Watch it with a healthy bit of skepticism just not cynicism. Write down all the questions that you have, because the next conversation is going to be you interviewing me. I think it is only fair. I'm going to be very transparent. I don't like to

the sugar coat this partnership. I'll tell you precisely the way it is. What it is and what it isn't. I want this decision to be a good fit for you and your family.

The other thing that will be on that landing page, there will be three testimonial videos. I mentioned that we want to Leave the Jersey in a Better Place. We care about the impact we are having of the lives of those that we partner with. These testimonial videos are three people that we have significantly affected. Watch those and I'll ask you which one resonated with the most the next time that we talk.

The second link that will be in the e-mail is a link to our leadership page. Here you will find all of the other people that are building agencies and partnered up with us on a leadership level — there going to be all different kinds of shapes, sizes, ethnicities, and education levels. We love that! We appreciate it. It adds flavor to what we're doing.

The last link is an assessment. I've mentioned that we like to leave people in a better place. We have partnered with a leadership firm. I don't know if you've heard of GIANT worldwide? They are a leadership development company housed out of Europe that helps to develop leaders worth following. They wrote a book called The Five voices, How to effectively communicate with the ones you lead. They have an assessment, we don't use the assessment for hire purposes, but we want to understand better what your method of communication is. If you can use the link to take the assessment and let me know what your top two voices are, that will help me understand how you like to communicate. It will help the next conversation to go a little bit more fluid and for me to be more focused on what you need in that conversation.

I'll make sure to send this e-mail out in the next hour or so. There will also be a link to schedule the next interview. I think after our next conversation we will have a good idea if this partnership is a good fit, or "hey it's a great culture, but I don't know that it is the right fit for me."

I am looking forward to the next interview!