

SECOND INTERVIEW PROCESS

- **Set clear expectations**
 - One of the things that you asked them to complete was the 5 voices assessment - What did you learn from this assessment?
 - Talk on how their voice order isn't good or bad, but just helps you understand what they need to have an effective conversation.
 - Try to remember that **FACTS tell and STORIES sell!** So make sure to ask them which testimonial where they most affected by?
 - Get straight into them interviewing you! That is what you promised! **So let's get straight to the point! What questions did you write down for me to answer?**
 - Once all questions are asked, you should ask at least ONE final question. **Is there anything else you need from me or from the agency to help you make a decision one way or the other?**
 - Set clear expectations moving forward!
 - Schedule your next meeting - Follow-Up meeting or Onboarding Session!
 - Make sure that **ALL** lines of communication are done through the messaging portal inside of vCita. This is important to maintain the branding that happens. Each email that is received through the vCita platform is branded Colburn Financial.
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INTERVIEW SCRIPT:

1. Quick Warm-up
2. Answer Questions
3. Did you get a chance to take the 5 voices assessment?
 - a. Voice Order (Make sure you understand these voices – Read the BOOK)
4. After looking at the videos, did the opportunity to create income for yourself as just a personal producer or by producing while building a team particularly stand out to you?
 - a. Here is an idea of what the team building process would look like for you starting out. We understand that you are going to have a lot of new things for you to learn so as leaders, we want to take away any sense of fear or being overwhelmed. Starting out, we would handle the interview process, training and helping people get started while putting them on your team. We would just ask you to “find the people” by reaching out to people that you know or placing ads online and gradually weave you into the team building process as you learn from listening in on the different steps of the onboarding process.
5. Are there any other questions that came to mind before I jump into our team expectations?
 - a. We have 4 primary team expectations of everyone that we extend this opportunity to.
 - i. The first one is integrity and honesty. What that means to us is finding the best solution for the families we get to work with as well as the team at large before ourselves. This follows the servant leadership that we work hard to embody which means helping others achieve their goals first and having those efforts in turn lead to us hitting our own individual goals.
 - ii. The second one is what we call “chase your mentor.” That means that we want you to ask a lot of questions. We would much rather have you ask

Client Name, State

100 questions in 90 days, than 10 questions a year for 10 years. It shows us as leaders that you are eager to learn more and are engaged in the process. So if you feel like you are being a pain in the butt to us, you are in the right spot.

- iii. Our third expectation is being an active participant. What this looks like is being on the conference calls, attending local events when the opportunity presents itself and especially attending the National Conference which is coming up on _____ at _____. We are very intentional with the handful of conference calls we have throughout the week so asking questions and taking part in our gratitude sharing that we do before every call will help you get the most out of them. The local and national events are vital for relationship building, training, and getting the opportunity to ask questions of people at the top of the company. You will quickly find that people at the top of Symmetry are going to be just as willing to help you as anyone else from Colburn Financial.
 - iv. Our last expectation is that the C in Colburn stands for commitments. We are very intentional about setting commitments and goals as separate items. We would much rather have you under promise and over delivery than vice versa. We want to help you build that confidence and accountability within yourself.
 - v. Do any of those seem unreasonable to you?
- b. A lot of people ask me what makes people successful or unsuccessful in this business.
- i. From what I have been able to observe, there are three main characteristics that I see in people that have success. They are being coachable, consistent, and persistent. Being coachable means that you continue to look for ways to improve whether it is related to personal growth or the business and constantly seeking feedback or asking questions to stay on the right track. This is a numbers-based system, so you need to be consistent with your activity and efforts even if you do not see immediate results in order to let the averages come to the surface. There are going to be ups and downs in your life and in this business so having the tenacity to continue to “pound the stone” as we say, will again help the averages come to the surface while helping your improve your efficiency.

Is there anything else you need from me or from the agency to help you make a decision one way or the other?

Schedule onboarding video call 15-20 min to walk through the Getting Started steps on the Colburn Financial website. Make sure this is completed through the “follow up” process in vCita.

You can set up a free account on Zoom meetings. You can have your own meeting ID # (limited to 30 minutes per meeting)