OK, let’s gather some words and then we’ll go back to you. Give me some words, three from this table?

*Reggae sauce. I’ve got noisy for Harley Davidson.*

*I’ve actually got desire for Harley Davidson.*

Tell me about desire.

*Not for me but I know that bikers lust after Harley Davidson.*

Desire, great one, one more.

*I came up with cruising motor bikes for Harley Davidson. Fun for Virgin.*

*Cyclone suction for Dyson.*

*Over-engineered solutions!*

Three words here, give me some words, Hilary?

*Ethical for Body Shop. Smells.*

*I’ve got mid life crisis for Harley Davidson!*

Love that, ok, that had to come from a woman but you’re right. Three from you.

*Communication, Facebook. Determination, Dyson. Challenging the norm, Virgin.*

Great, I like that. Words, what do they inspire you to think with their brand name. One from you, David?

*I got laid back lifestyle for the Reggae Reggae sauce.*

*Dangerous for Facebook.*

*Levi roots fairy tale.*

OK, love that. Now, what about you? When I hear your business name what words come to my mind? What words would you like to come to my mind if I were a prospective client looking at your business. Now, jot that down on the bottom half of that page. Please do not give me integrity and honesty. That is a given.

I see on business cards from IFAs Integrity Are Us. I just think, come on guys, you can do better than this, it’s a given. If you’ve got not integrity get out of the industry and stop screwing it up for the rest of the industry. What words come to mind? What would you like to come to their mind when they think about your business? Why are you so different? It’s hard isn’t it? That’s why your peer group doesn’t get it, because it’s hard, yet, but they will. We are great doers in this profession, we work so hard but the thinking is where we could invest more energy, the quality of our thinking. Not our knowledge, our thinking.

One more minute on this. Remember, one day, this is going to end up on your website, in your material, in your brochure.

Craig, have you shifted from, because everything in life is not black and white or is that still where it’s at?

*We’ve got another bunch of ideas but that’s written on the back of the card, still because I’m too tight to pay for new.*

That was Craig’s initial mantra, do you want to tell them the name of your business?

*Penguin. And then, not everything about life, or not everything about your money, not everything about finance is black and white, were the three things we got stuck down. Everything is done in grey and gold, grey and orange so it’s not black and white, all the office colours, all the stationery.*

So that’s where he started but I sense that Craig is shifting form that to something even deeper. We had a really interesting day together, I came away quite... I was supposed to be Craig’s coach but I came away inspired thinking “that is so much fun.” Not everything in life is black and white.

Ok, if I give you an example, before we move on, and then we’ll come back to this again. Let me have a show of hands here who’s read the Soul Millionaire. Second edition has just come out slightly updated version, taking into account different technology. Someone just bought 60 copies of the Financial Planner, Andy Nebbutt. I said “why did you do that?” He said well, having read it, what Thomas Powell, who is chairman of Ecademy.com – I don’t know if you’ve ever heard of Ecademy.com – it’s about 150,000 members so it’s not huge, business networking platform, social media, Thomas said, ok, lovely words, extraordinary, this book has the power to make you rich in the fullest sense, so ostensibly it’s about money but when you start getting into the book it’s about more than that.

I asked Andy, “why did you buy 60 copies for your top 60 clients?” He said “I want them to see money and life differently. Therefore, this is going to be part of the tool before they come back for their annual review meetings or their first meeting as prospective clients, I want them to see money and wealth differently and I think this book will help me do that. So, they read it and then they come and talk to me and they are now on my page.” So, it’s just a tool. So, for him, this is part of his being different in the eyes, hearts and minds of the client. Does that make sense? He wants them to see that what’s the sub-title? “True wealth is within your reach, not just money but true wealth is within your reach”. So, he’s shifting mindsets using a book as a tool. So, that’s why his business is becoming different using my business. How is your business different?

Let’s move on to Page 18. So, 17 is really obvious. 17 is just saying, look, we are talking now about positioning, when your business, what do I mean by positioning, what do we mean by that, anybody want to tell me about that? What do I mean by positioning? Go on Nick.

*The place where you are working at optimum ability or efficiency.*

The place where you are working at optimum ability or efficiency, ok, I get that. any other thoughts?

*The space you hold in your client’s mind.*

*In the mind of your keeper... sorry, perfect clients.*

Yes. So, where we’re going with this, Nick, is I want you to own a space out there in the mind and heart of your perfect client and when they think about doing this in their life they think about you. So, I want a really fizzy, sparkling drink that will just give me a bit of pep, brand names.

*Coke. Schweppes.*

Come like that (clicks fingers) that what you need to do to them. How will you position your name and your business in their minds and hearts so that you own that space. Does that make sense? That is what position is all about. If you do that you will attract quality clients, you can also attract a more talented team and it will be nothing to do with your personality and how lovely a guy or girl you are, it will be this is the way the business owns space in their mind. How do you do that?

Turn to Page 18. You need a pen, or a highlighter, there are highlighters on your table, use them. I want you to highlight which of those strategies you currently use or would like to use for your business. Now, I will shoot a warning across your bows. This is not optional. You either have a business strategy or you have business by bumble and you pay the price. You can have two or three mixed together but never more than three otherwise it’s total chaos. Which of the business strategies does your business currently run or which ones would you like to run?

If you are going to have a business that attracts brilliant clients without you running your tail off you have to have a business strategy of some sort behind the dream. So, where is your business positioned?

*You can have more than one, David, can’t you?*

You can have more than one but I would strongly suggest you tried not to play three at the same time because you will just get yourself really screwed up.

On Page 19 you write down the ones you’ve chosen and why.

*Can I ask you about unique sales method? What do you mean?*

Do you want me to give an example of that? Can anyone give Sabio an example of (4).

*Seminar selling would be a unique way of attracting clients.*

Ok, so where the whole business just does nothing but seminar selling to attract clients. That’s what it does. Who does that brilliantly in terms of effectiveness as an IFA business, sorry, as a financial advice business, not an IFA?

*St James.*

St James Place. It’s a brilliant business model, it’s fabulous, don’t knock it, they’re brilliant at it.

*They’ve shifted it now. They don’t do seminars anymore unless the advice pays for it themselves. They’ve started special wine evenings. I had dinner last night, I just met with them just to listen. They now try doing large, inviting millionaire type people to luxury places with wine tasting and they have meeters and greeters and they’ve slightly shifted it.*

Positioning, they’ve shifted their positioning. Write down your business strategy that will position you and hold you in the heads of your target market and why you feel that is, Page 19, you write down your answers. I’ve chosen these two or three or one because...

OK, we only spent 45 minutes on lunch so we will start and stop on time, so highlight where you think you would like to be, what position, strategy, positioning strategy are you going to aim for in the next 12 months? If you don’t choose, then the results will show that lack of choice. Just helping you translate your dream.

Ok, when you’re at lunch if you can make sure you have your badges on so all your team mates and non-team mates can really get to know you. A couple more minutes on this and then one or two share.

Right, now I would like you to spend five minutes, if you’ve finished writing, explaining, just pick two people on your team, have them explain that page to the rest of the team. “This is what I’ve chosen as my business strategy and positioning, this is where I’m positioning myself and this is why” just choose two people on your table and they must explain it to the rest of the team, just five minutes in total.

If you’ve not finished writing just quietly carry on writing.

Blimey, having to think!

And lunch is ready. We come back in exactly at 1.45 so we have 44 minutes.