

Anatomy of a 3-Way Call

by Max Associate – Al Lee

Having now done a number of 3-Way calls as either the *Expert* or the *Broker*, and having discussed the proper and effective way to do 3-Way calls with some of our very experienced and knowledgeable senior partners, and realizing that I may not have shared what I learned with all of you, I have decided to write this “anatomy” so that when we are doing these calls, we all have the same understanding of our methods and objectives.

Roles

There are three roles filled by the people involved in a 3-Way Call:

- The *Prospect* is the person being introduced to this business opportunity
- The *Expert* is the senior or more experienced person being called
- The *Broker* is the Associate who is introducing his/her Prospect to the Expert

Purpose

First, the purpose of the 3-way call is NOT to educate the prospect. We have far better materials on our websites than anything that could be related in a phone call. The purpose for the call is to make the Prospect feel comfortable with us—*the people* they will be working with.

The 3 objectives of the call are:

1. Give 3rd party validation and credibility for the Max Opportunity
2. Build rapport and develop trust
3. Uncover the Prospects motive – *this is critical*

Done properly, the call should also move them forward in the decision making process. For instance, if their interest level was at a 5 (out of 10) prior to the call – we want that 5 to move up!

Parts

The parts of the conversation are:

- a. Introduction
- b. Dialog
- c. Conclusion (with forward-moving invitation)

The Ending of the call should be triggered by the Expert. See below! If the Broker triggers the call to end it will make the Prospect feel that they were cut short or not deemed worth more time. If the Prospect triggers the call to end it will leave them with the impression that they have heard all they are interested in hearing and no further inspection is warranted. If the Expert does it, though, it leaves the Prospect “wanting more”.

Introduction – the Broker initiates the call by calling the Prospect, putting him/her on hold, calling the Expert, and connecting them all together in a 3-Way conversation.

Then the Broker gives a brief introduction in which he/she gives the Expert credibility by stating positive aspects of the Expert’s biography—such as: “...has owned a number of businesses”, “...is rapidly building a business in several states”, “...is doing very well in this business”, and so forth.

Always pay tribute to the Expert so that the Prospect will respect and listen to what he/she has to say.

Then the Broker gives a brief introduction of the Prospect which might mention a reason why this Prospect might be a good fit for this business—such as: “...is very active in business circles”, “...has been a very successful real estate broker”, or what have you.

The Broker gives the Prospect’s name *clearly*. The Expert **must** remember the Prospect’s name—and should probably write it down to be certain. If not sure, the Expert should ask for the spelling so as to be able to pronounce it correctly. Their name is important!

Then the Broker just gets quiet and lets the Expert have control. The only time the Broker should talk again is if asked a direct question by either party, or to give thanks to the Expert for giving his/her time and thanks to the Prospect for taking time, etc. at the end of the call. When asked a question, the Broker should answer appropriately; but as briefly as possible. The Broker should do about 5% (or less) of the talking on the call.

Dialogue – the Expert will then talk; but not to offer a lecture or sales pitch about the products, the company, or anything else. **In fact, the Expert’s goal is actually to get the Prospect talking.** The Expert is establishing rapport with the Prospect with the intention of making the Prospect feel comfortable with *the people* they would be associated with in this business. In a good 3-Way call, the Expert will have done not more than 20% of the talking.

Note that between the Broker and the Expert they have done no more than 25% of the talking. That means that the Prospect will have done at least 75% of the talking.

If that happens, it is pretty certain that the Prospect will leave feeling quite comfortable with *the people* they are getting involved with. Notice that the call is NOT to convince them that the products are amazing; though there might very well be some talk about how great the products are. Notice also that the call is NOT to convince them that this is a valid financial opportunity – though there might very well be some talk about the unique features and benefits of the Max business.

TIP: The Expert should try to ask questions of the Prospect that will get “Yes” answers and avoid “No” answers. When people actually say “yes” or “no” they become more inclined to be agreeable or disagreeable, respectively, with you. Get them saying “yes” (to anything) early on!

TIP: Smile. It comes across, even over the phone.

The Prospect will make their decision to join us or not join us mostly based upon how they feel about *people*. Information about our products, comp plan, and everything else about our business, can be found online. We know that what they learn about our products, company, owners, and so forth will all be very good. If they want to study the material that is available, they may certainly do so; but the thing they can not get from reading online material is that level of comfort with our team. Only a personal conversation can accomplish that.

**If the Prospect feels good about the people they would be working with,
they will be inclined to want to join our team.**

Another very important objective of the conversation is to get the Prospect to express his/her **Motivation** for doing this. Some people want or need to make money. Some want to be able to spend more time with their families. Some have a physical problem that makes working a traditional job difficult. There may be many different motivators. The Expert is not just trying to determine what the

motivation is; but to get the Prospect to express it—to actually say it. When a person hears themselves, in their own voice, saying something, it has much more weight than hearing someone else say it or even just thinking it themselves silently.

If you can get a person to *say out loud* that they are interested in this business because they desperately want to be able to spend more time with their children (or for any other reason important to them)—then get them to elaborate on it, they will almost certainly hop on board very quickly and will work hard to make a success of it. Motivation is one of the key factors for success. People who do have it, and clearly understand what it is they are working for, will most likely succeed.

Conclusion / forward-moving invitation – The Expert triggers the conclusion of the call by offering up a **next step** for the prospect. Depending on the prospects expressed motive and level of interest – here are some possible forward moving invitations:

1. Invitation to dial into a Tuesday night biz op call
2. Invitation to watch MaxGXL TV with you
3. Invitation to attend your next home meeting
4. Invitation to explore the mymaxtrack website
5. Invitation to attend our private team fly in to Utah
6. Invitation to do another 3-way call with someone of similar interest or background
7. And, YES – on occasion, the prospect may be ready to make the commitment to sign up with their Diamond Pack on the spot. You would then invite them to complete the homework preparation (outlined in our new associate draft e-mail under downloads on mymaxtrack.com) and set up their Getting Started Strategy Session appointment.

We sometimes use the expression: “**BaMFaM**”, meaning: **Book a Meeting From a Meeting**. This call is not an end unto itself. It is just a step in the journey and you must plot the next step before you cut off the call.

Ending the call: The Expert ends the call saying something like: “It has been very nice meeting you <Prospect Name>...”, or some other obvious cue. **It is important to use the Prospect’s name** and to pronounce it as correctly as possible. Then the Broker thanks the Expert for carving out valuable time to talk with them and thanks the Prospect for joining in the call and everyone hangs up.

Important notes:

If the Expert makes a mistake or omits something, the Broker must not jump in or correct him/her. To do so would undermine the credibility of the Expert in the eyes of the Prospect, which would defeat the purpose of the call. Remember, the call is not about informing or educating; even though some of that might happen. It is about building rapport between the Prospect and our Team.

If you can say at the end of the call that the Prospect did most of the talking while you just listened, it was probably a successful call. It does not matter much whether the Prospect was talking about their current job, their children, morning rush hour traffic, or almost anything else. If they did most of the talking they will leave with a good feeling about the conversation and the people they talked to. If they do little talking, they will feel like they were being delivered a sales pitch or a lecture.

Setting up the call

One important thing to note is that how the *Broker* sets up the call with a *Prospect* is important. The *Prospect* should feel that the *Expert* is somebody important and that his/her time is valuable and that it is somewhat special for this *Expert* to give some time to dedicate to them. All of this is actually quite true. You should know that only a small percentage of the Associates in this business use this methodology. It happens, they are the same ones who are making the most money and building large organizations.

The *Broker* should not represent that the *Expert* has lots of time available and can talk with them any time that is convenient for the *Prospect*. Rather, the *Broker* should always say that they will *try* to get the *Expert* to give them some time. It is good that the company's Customer Support staff is available any time they are needed; but is the *Expert* is someone special whose time is limited and valuable.

The *Broker* may say that the *Expert* gave him/her some time at 10:30am (or any other time) or may say that if the *Prospect* will be available between some time and some other time, he/she will try to get an appointment with the *Expert* within that time range. The *Broker* must never make it sound as if the *Expert's* time is easy to get or that the *Expert* is just sitting around to be available in case anyone wants to talk.

The *Expert* should likewise maintain that posture by not saying things like: "you can call me any time..." while in the call.

Example scripts for *Broker* to *Prospect*:

"<*Prospect*>, I am available tomorrow between 10:30 and noon. If you can be available then, I will try to get us an appointment with <*Expert*>."

Or, if you have already determined an available time from the *Expert*:

"<*Prospect*>, <*Expert*> has given me a half hour at 10:30 tomorrow. Can you make that time?"

Then, if the *Prospect* is not able to do that; but offers that he can be available at some other time, *Broker* should respond that he will *try* to see if the *Expert* can make that time available.

Fundamental premises:

The following fundamental premises underlie the entire methodology for our 3-Way Calls.

■ The best mechanism for getting someone to talk is usually an open-ended question. That is a question that invites a narrative response rather than a yes or no. Once a person starts talking, simply indicating that you are interested and paying attention (by an occasional "I see." or "Really?") usually encourages them to go on. To draw them out further to expressing their motivations, ask another probing question, such as: "...and does that really bother you?" or "...how important is that to you?".

■ If you allow the other party to do most of the talking they will normally leave feeling that it was a great conversation. Most people like to talk if someone is listening and interested. They also like people who listen to them. Their favorite topic is—themselves and what *they* want, not what *you* want. The most beautiful sound in the language is a person's own name.

■ Sharing your own motivations and the emotional reasons why you got into this business helps establish rapport and makes it easier for the other party to open up about their own motivations.

■ You cannot *give* Motivation, you can only reveal it and bring it out. If someone does not have a motivation to do this, you can not create it for them. However, if you probe, you will find that most people do have a motivation, even if they do not know it yet. Most people need more money and want more time with their families or their hobbies or want to be able to do more for a charity or... There is nearly always a motivation in there somewhere. (*People decide to do this to relieve a **pain** they are feeling. Find that pain!*) You can uncover it if you ask the right questions. "Are you concerned about your job security?", "What would you do if you had an extra \$500 per month—or \$5000?", "Does that job keep you away from your family more than you wish?".

■ When a person hears his own voice saying something, he is inclined to believe it more strongly and to defend it through what he says and does henceforth. It is like a commitment to a personal policy or creed. If someone says: "I would work my fingers to the bone for the next 5 years if I knew it would make me financially secure for the rest of my life", he has actually just made a commitment to himself. He has agreed to a bargain. Getting someone to speak his motivations for doing this *out loud* is a powerful tool that clears away a lot of the smoke and lets you get at what really matters to him.

■ Actually saying the word "yes", out loud, makes a person more inclined to agree with you. "No" has the opposite effect. This is true even if their response was to your comment about the weather or a football game—it is the actual *saying of the word* that has the effect.

■ The subconscious "logic" in a person's head tells them: "I would have to trust someone to reveal my emotional motivations or my financial situation--I just told <the Expert> my emotional/financial secrets; therefore, I *do* trust that person."

■ People will enroll for an *emotional reason*, not a calculated mathematical reason. After they enroll, they will do research to find and calculate the logical and rational justification for their decision because they do not like to admit that they make emotional decisions. If you can identify and latch onto the emotional motivator, the result will likely be a new enrollment. If you can keep the new associate focused on that motivator, they will push hard to succeed—regardless of obstacles.

■ In traditional sales training you would be taught that silence—keeping your mouth shut—will get you further than talking. In fact, in many circumstances the rule is: *the first one to talk loses*. In our business that is often the case, as well. Develop the skill of listening.

■ The best response to an objection is a delayed response. Be thoughtful, not defensive. Often the objector will negate his own objection if you give him time to do so. If you immediately defend, you appear “defensive” and you cause the objector to strengthen his resolve. Do not tell him he is wrong. Express understanding of his concern, then, if he does not retract his own objection, gently point out that what he says is ordinarily correct; but this is a special situation—or something like that.

Summary

In summary – 3 way calls WORK if you understand the purpose, objectives and format. Remember, people don’t join products, they don’t join a business – they join PEOPLE.