



eBook ISBN: 978-9625977-3-2  
228 pages  
Release Date: 2009  
Retail Price \$39.00

**Limited Time Advanced  
eBook Sale Price:  
only \$29.00!**

www.ProspectandFlouish.com



**Keith F. Luscher**, is author of the book **Prospect & Flourish**, and four other books. He is a marketing representative with Principal Financial Group®. Prior to

joining Principal®, he served professionals in the insurance and financial services industries as a management consultant. In that role, he advised producers on issues related to marketing and prospecting, and developed groundbreaking educational curriculum. In addition, Luscher is also a nationally known author, speaker, and expert in media, interpersonal communication and marketing.

© 2009 Keith F. Luscher.



## You Have to Big Deal It!

by Keith F. Luscher  
Author, *Prospect & Flourish*

Last issue we addressed the importance of having your own personal board of advisors (PW45: Don't Go it Alone). Serving on your board should be a pleasant experience—not something that your members should do with hesitation or regret. To maintain the maximum benefit from your board meetings, you must be prepared to provide maximum input—you must be prepared to Big Deal It!

The more seriousness you give the process in front of your board, the more seriously your attendees will take their roles as members. They need to see that you mean business.

Here are some steps to scheduling, preparing, and administering a successful meeting of your personal advisory board (Note: more detail can be found in my book *Prospect & Flourish*):

1. Schedule your meeting at least two months in advance. Pick at least three options, and find out which choices are the best for all your members (ask them to indicate to you which ones work—and emphasize that it is important that they choose more than one, if possible). The more options you offer, the better your chances of having full attendance.
2. Choose a business setting for your meeting. Meeting rooms are not difficult to obtain, whether rented or simply at your corporate offices.
3. Once the time and place is set, send out letters to confirm. When I say letters, I mean LETTERS! Taking the time to send out a personalized letter on your company stationery sends the subtext message that you appreciate their time and respect.
4. Prepare Information Packets. A complete information packet should include the following:
  - Your brochure/marketing package.
  - A statement of business objectives.
  - A meeting agenda.
  - A one-sheet indicating time and place.
  - All combined into a pocket folder.
5. Hand-deliver (if possible) the information packets to your board members. This should be done one-to-two weeks prior to your meeting.
6. Call each member personally to confirm receipt of the package and of their plans to attend. It never hurts to make an extra call, and many of your members will appreciate the reminder. It also is the best way to ensure the highest attendance possible.
7. Arrive early to properly set up. You do not want to arrive at the same time as everyone else. When your guests arrive, they should find you there to receive and greet them.
8. Have the following items available for your meeting:
  - Extra information packets
  - Pens and notepads, just as a precaution.
  - Refreshments
  - Simple thank-you gifts. (such as a restaurant gift card or a nice pen).
9. Lead the meeting from your agenda. Outline where you are, where you have been, and where you want to go. Use your materials to back up your information. Get productive feedback, and stay focused on creating the results you intended.
10. Keep the momentum going. Follow the agenda. Elicit ideas and suggestions. Build ownership. Further, share your numbers. The more concise you are, the better the advice you will receive. Remember, these people are your centers of influence (PW #3: Networking, Newtonian Style) who share your vision and want to see you succeed. This will also make it easier for them to introduce you to new prospects.

Sound like too much? If you make it important, so will your board members also feel its importance. They will take your work, your intentions, and your inquiries seriously, will not hesitate to give you the best guidance, and will connect you to the best prospects available.