



How to Successfully Work with Individual Generations

QUICK REFERENCE GUIDE

MILLENNIALS	GENERATION X	BABY BOOMERS
<p>Be all digital – they access everything online: information, people, products, etc.¹</p> <p>✔ Use technology in all interactions including communications, during the sale. Also provide useful digital resources to them along the way</p>	<p>Initiate research – they make decisions based on facts, data, reviews⁵</p> <p>✔ Support their educational needs and substantiate your claims with data, stats, research by offering variety of non biased sources</p>	<p>Make it personal – they want to develop personal relationships in both personal and professional lives</p> <p>✔ Create face to face opportunities to get to know as much about them as you can – family, interests, birthdays, etc)</p>
<p>Desire instant gratification – everything needs to be quick and easy²</p> <p>✔ Provide useful resources regarding their financial concerns such as calculators, checklists, online quoting tools</p>	<p>Take control – they prefer to be in the driver’s seat in making decisions⁶</p> <p>✔ Offer multiple scenarios and consider worst case scenario options that offer a way out for maximum control</p>	<p>Exhibit professionalism – they appreciate experience, accreditations, credible company reputations, brands, etc.</p> <p>✔ Acknowledge both yours and your client’s credentials, experience and success as well as affiliated company credentials</p>
<p>Seek membership – they gravitate towards groups while striving for independence³</p> <p>✔ Include the group in prospecting, but take the time to focus on each individual needs. Leverage online tools such as Life To The Max to demonstrate the ability to see individual scenarios.</p>	<p>Evaluate viability – they are very practical and prefer quick results⁷</p> <p>✔ Be brief, be brilliant, be gone, meaning be efficient and don’t waste their time - focus on results</p>	<p>See the big picture – they like to have a long-term plan</p> <p>✔ Recommend a tailored long-term plan that is specific to their personal needs/situation</p>
<p>Value transparency – they value honesty and have a low tolerance for inauthenticity, just be yourself to win them as a client and a referral⁴</p> <p>✔ They value honesty and have a low tolerance for inauthenticity, just be yourself to win them as a client and a referral⁴</p>	<p>Remain connected – they are big online buyers²</p> <p>✔ Use technology to empower decision making; provide online education, tools, test drives, etc.</p>	<p>Desire a team – they like contributing to a team effort</p> <p>✔ Focus on common goal and how your recommendation will add value – you are on their team</p>

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