

Using CD's to Introduce Myself

By Angus McQueen - Melbourne Victoria Australia



We have recently made a promotional CD Rom to give to prospective clients. It goes through what we can do for them, some of our sales concepts, and shows our key advisers, and our offices.

Some people don't know why they are seeing a financial planner for initially, but they know that they have to see someone. The CD gives them an insight to services we can provide for them.

We have an industry testimonial from one of our product providers, and 2 clients giving testimonials of their dealings with us. We have filming from our golf days, wine tours, and cricket days on the CD also. All this is on a 5 minute edited movie. We send it out to our prospects and referrals before they meet with us as a way of warming them up.

We have found it to be a different, but simple medium to promote the practice.