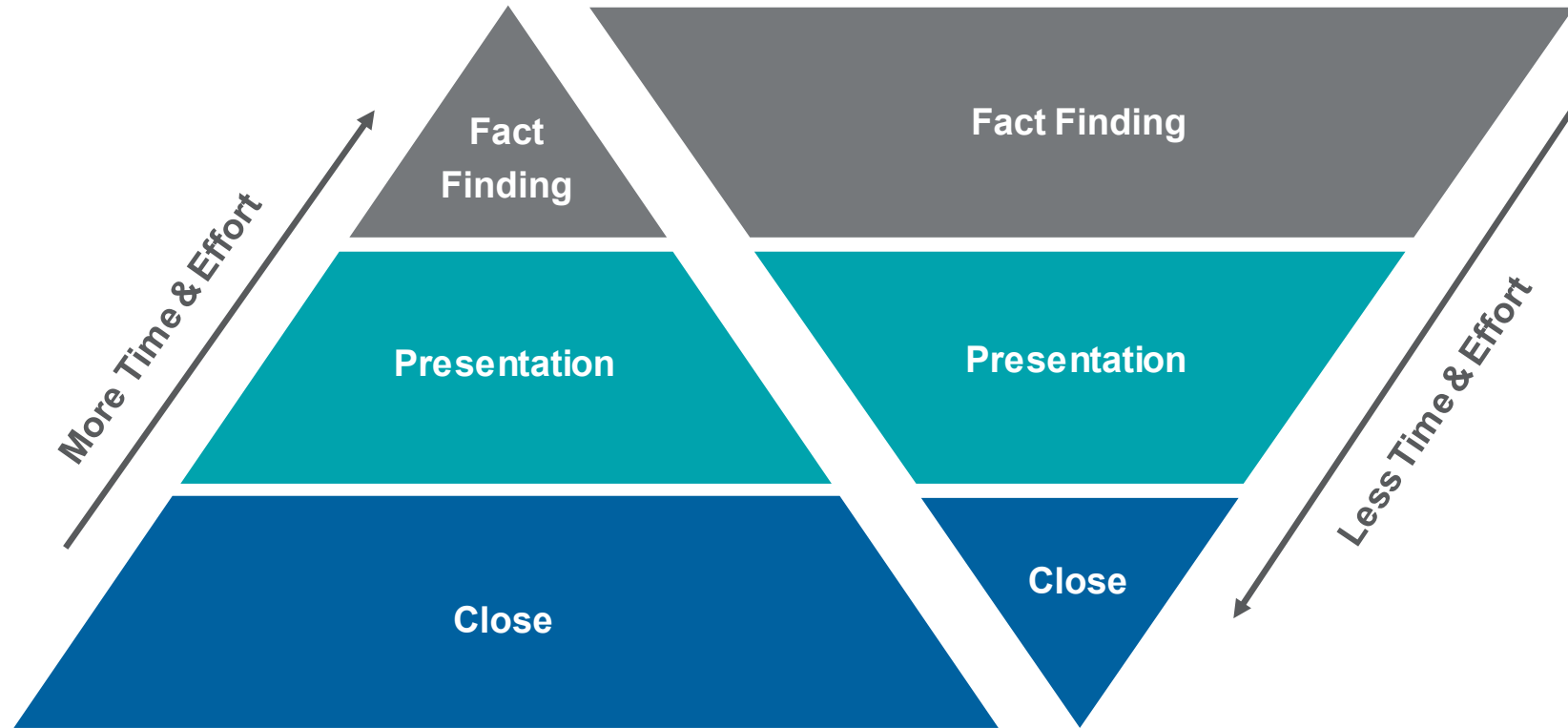


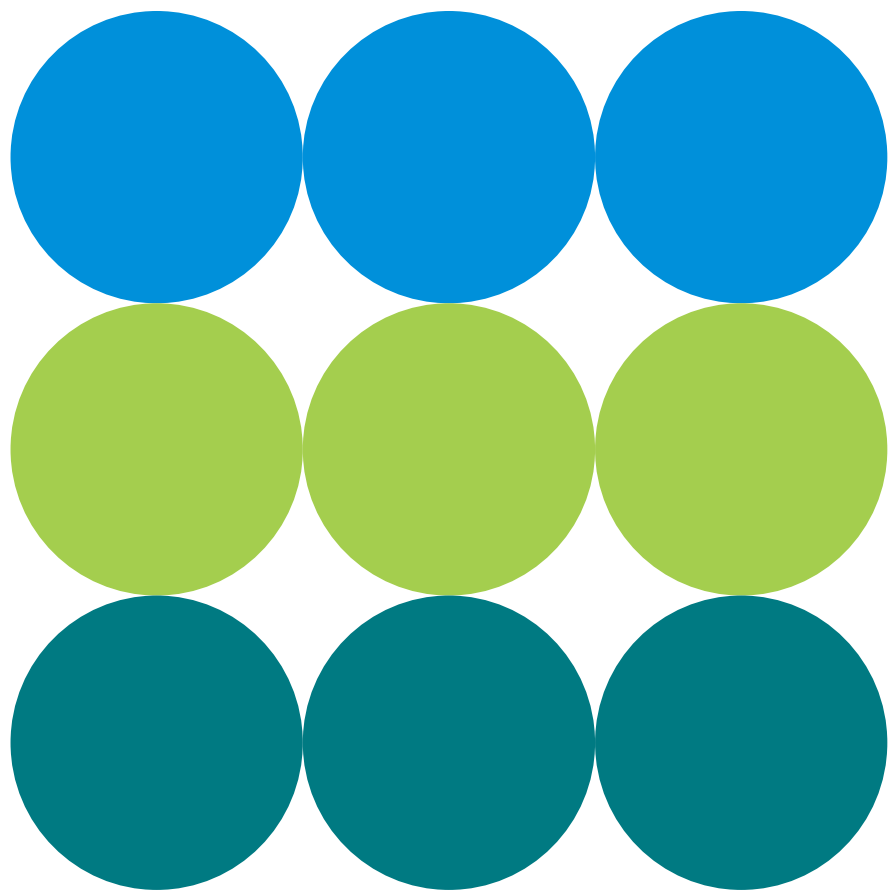


# Fact Finding



# Fact Finding





## Effective Probing



## Fact Finding Skills

### 1- Effective Probing

The better you are at asking the right question, the better you become at uncovering needs !

#### Types Of Questions:

- **Closed Ended Question** which are very easy to ask, simply can be answered by “Yes” or “No”  
For example:  
Are you married? Do you have any children? Have you worked here long? Do you have any loans?
- **Open Ended Question** which are more difficult to ask but are much more useful, it requires more thought and more than a simple one-word answer.  
For example:  
Who are your dependents? / How many children do you have? / How long have you worked here? / What loans do you have?



## Fact Finding Skills

### 1- Effective Probing

#### Types Of Questions:

**Feeling Questions**, in addition to finding hard facts, you will also need to find the prospects feelings:

For example:

- what the prospect wants out of life?
- How he feels about protecting his family?
- How he feels about securing his future/retirement?
- How do you feel about giving your children a college education?
- Why did you choose to save money in the bank?
- What were your reasons for taking out this strategy or plan?

**Leading Questions**, questions that prompts or encourages the answer wanted.

For example:

- How fast was the red car going when it smashed into the blue car?
- How much will prices go up next year?
- Am sure you do care about your children's future. Don't you?



## Fact Finding Skills

### The Questioning Funnel

#### Situation. Can you please..

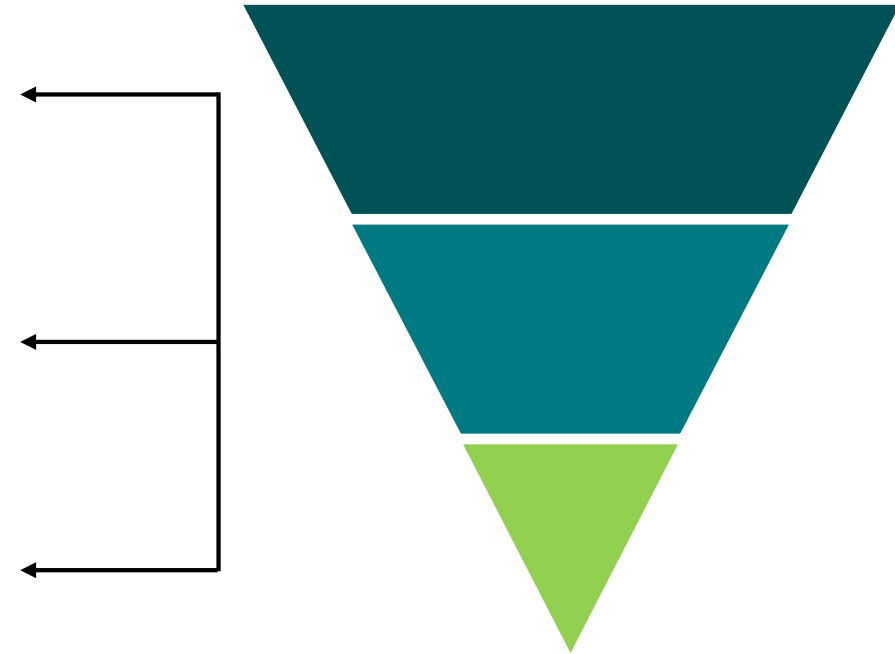
- Tell me...
- Explain to me...
- Describe...
- Talk me through...

#### Create Need

- What are the consequences...
- How will that impact...
- What are the implications of...
- Who will that affect...

#### Execute

- What are the next steps...
- How would you like to proceed...





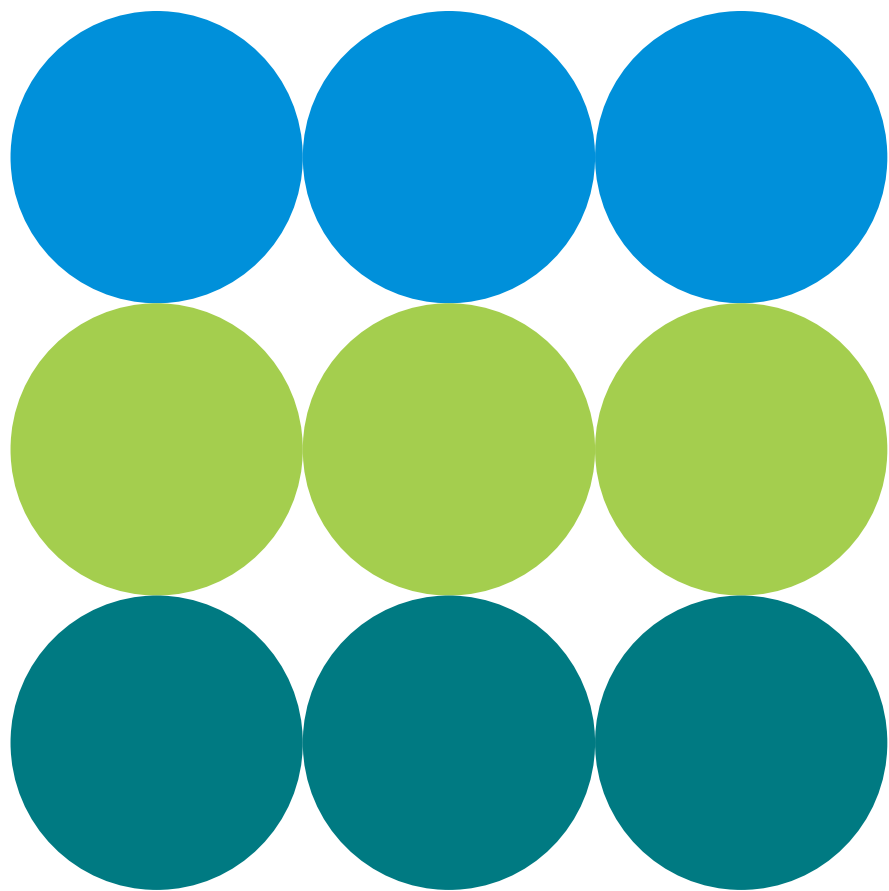
## Fact Finding Skills

### Guide Lines For Effective Questioning

- Don't let the appointment turn into an interrogation
- Always give your prospect enough time to answer your questions.
- Make sure you get the information that you require.
- Ask the question again in a different way if you don't get the information that you want.

### Important Tip

- If you use all closed questions, Fact Finding will seem like an interrogation to the prospect.
- Ask open ended questions to let the prospect talk and be an active part of the process.



## Active Listening



## Fact Finding Skills

### 2- Active Listening

The intent to understand, *Seek first to understand then to be understood !*

Ignoring

Not really listening at all

Pretending

Yeah! Huh.. Right

Selective Listening

Hearing parts of the conversation

Attentive Listening

Paying attention on the words said

Active Listening

The Intent to understand



## Fact Finding Skills

### Guide Lines For Active Listening

- Be patient and let the prospect talk.
- Don't interrupt - or show any lack of respect.
- Make eye contact and nod at the client to show that you are listening.
- Show interest in the prospect's answer.
- Make sure that your prospect can see what you write down.



Navigating life together