

JIM POE

The Guaranteed Income Process™

Packaging helps double sales

Jim Poe, CEO of **Senior Retirement Planners**, an independent financial advisory firm in Fort Worth, Texas, is enjoying unprecedented business growth after packaging his proprietary retirement planning process.

Jim and his team use *The Guaranteed Income Process™* to help people who are planning for, or already enjoying retirement, develop and implement a personal plan for guaranteeing their retirement income. “We have doubled sales and reduced the amount of work we do,” he says. “We’ve expanded our operations significantly because we have been attracting much bigger clients. Before we packaged our process, the bigger fish were swimming away from the boat.”

As a member of our private program, Jim and his team have been working with BIG president, Curtis Verstraete, to identify, develop, and package the unique value they bring to clients. “The process has helped us cut through all the stuff and identify the real value we offer,” Jim says.

Telling a well-packaged story and delivering a proprietary process has made a significant difference in how prospects and clients think and feel about Jim and his team. “We now say we have no products to sell them,” Jim says. “Instead, we go through the planning process first, before we go through our toolbox. People love that we never talk about products until their personal plan is complete.”

As a “pathological learner”, Jim says *The BIG Idea Adventure* has helped him transform his business from a commodity-driven, fast food experience to a client-driven, gourmet experience.

“People now pay us fees for our advice. And, because we charge for the plans we create, we are able to invest the time and effort needed to make them as complete and effective as we can.”



JIM POE

“Before we packaged our process, the bigger fish were swimming away from the boat.”