LEGACY PARTNERS

INVITING PLAYBOOK

Invite with confidence. Let the tools do the telling.

Four keys to inviting the right way. Master these, then use the playbooks that follow.

1

USE THE TOOLS

Let the tools do the talking

Videos, Zooms and your mentor tell the story better than you can, and they tell it the same way every time.

- **Tools are duplicable.** If you present, they think "I could never do that." If you send a video, they think "I can do that."
- **Don't answer questions. Point to a tool.** The moment you answer, you become the expert and they start judging you. One wrong answer can stall everything.

SAY

"Great question! The video covers that better than I can."

2

HOW TO INVITE

Invite. Don't explain or present.

Your only job is to get them to the tool. Keep it short and excited.

- **Don't get pulled into presenting.** When they ask "What is it?", that's curiosity. Keep it high by pointing them to the video.
- **Let the tools do the talking.** "That's what the video explains." "That will get explained on the Zoom."

WHEN THEY ASK "WHAT IS IT?"

"It's easier to show you than tell you. Do you have 3 minutes?"

3

SET THE APPOINTMENT

The goal of every appointment is to set the next appointment.

Whoever sets the next step controls the conversation. Make sure it's you.

- **Always give two choices.** Ask "which time," never "are you interested."
- **Never leave it open.** Skip "Let me know" and "Get back to me." Book it before you hang up.

SAY

"Is tonight at 7 or tomorrow at noon better for you?"

4

FOLLOW UP

The Fortune is in the follow up

Most people say yes after the follow up, not the first ask.

- **Be fast.** Call back minutes after the video and right after the Zoom, while they're excited.
- **Book the follow-up before you send anything.** Info without a time rarely gets looked at.
- **Call right on time, and stay friendly.** "Not now" isn't "never." Set a check-in date.

SAY

"So we can talk after you look at it, is tonight at 8 or tomorrow at noon better?"

THE MAIN INVITE

The 30-3-30 Playbook

30 seconds to get 3 minutes to get 30 minutes.

30 sec

1 · CALL

Make a quick, excited call. Don't answer questions. Your goal is 3 minutes of their time.

3 min

2 · VIDEO

Send the 3-minute video only when they can watch. Call them back in 4 minutes.

30 min

3 · ZOOM

Questions? Invite them to a live 30-minute Zoom where they get answers. Offer two times: **"Monday at 7 or Wednesday at 7?"**

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FOLLOW UP

Call right after the Zoom. Ready? Enroll them. Questions? Book a 3-way call with your mentor.

SAMPLE SCRIPT

"Hey Sarah, quick question. Do you keep your options open for making money? (Pause) Can I share something with you? It may be a fit, it may not. There's a video that only takes 3 minutes. Is now good, or would tonight be better?"

THEN KEEP CONTROL OF THE CALL

You set every next step. Never hang up without a time on the calendar.

IF THEY CAN WATCH NOW

Send it and set a callback

"Great, I'll send the video now and call you back in 4 minutes."

Text the link while you're still on the phone, then call back on time.

IF THEY SAY "JUST SEND IT"

Don't send it yet

"I'd love to, but I want to be there for your questions. Is later today or tomorrow morning better?"

A video sent without a callback time rarely gets watched. Send it only when they can watch.

IF THEY NEED ANOTHER TIME

Book it, then send it

"Great, I'll call you back and send the video then."

Put the time on your calendar. Send the link when you call.

Don't answer questions
Defer to the tools: "Great question, the video covers that."

Ask, don't tell
Questions keep you in control. Explaining hands it over.

Questions after the video?
Book the 30-minute Zoom and offer two times.

Follow up right away
Call as soon as the Zoom ends.

ANOTHER WAY TO INVITE

The Four-Part Playbook

Hit all four and your invite stays short, sincere and focused on one thing: getting a time on the calendar.

1

Only Have a Minute

Open by letting them know you're short on time. It keeps the conversation brief and stops you from drifting into explaining.

2

Why

Tell them why you thought of them. A sincere, personal reason lowers defenses and makes the invite about them, not the business.

3

When

Lock in a specific time to watch or attend. An invite without a "when" is just a conversation.

4

Support

Point them to the support behind you: the presentation, the event or the leader who will share the details. You invite; they explain.

SAMPLE SCRIPT

"Hey Mike, I only have a minute, but you came to mind because you've always been sharp with money. Can you make time tonight at 7 or tomorrow at 7? My mentor is doing a short presentation, and he'll walk you through everything."

ANOTHER WAY TO INVITE

The Question Playbook

Start with one question, then use these word choices to keep the invite low-pressure.

?

START BY ASKING

"Do you keep your options open for making money?"

Share / Show

"Can I share something with you?" or "I'd love to show you what we're doing." Inviting language, never selling language.

Only / Just

"It only takes 20 minutes." "Just take a quick look." Small words that make yes feel easy.

May / May Not

"It may be a fit, it may not." Giving them permission to say no takes the pressure off and keeps them curious.

Two Choices

"Is tonight or tomorrow better for you?" Offer two times instead of asking if they're interested.

SAMPLE SCRIPT

"Hey Lisa, do you keep your options open for making money? (Pause) I'd love to show you what we're doing. It only takes 20 minutes. Is tonight or tomorrow better for you?"

CHOOSE YOUR APPROACH

Match the script to the person

IF YOU'RE INVITING…	USE
Someone you know well or have influence with	**The Curiosity Invite**
Someone who respects you or likes your leadership	**The Direct Approach**
Anyone, when you're new and don't have results yet	**The Third-Party Credibility Invite**
Someone skeptical, busy or influential	**The Indirect Approach (Opinion, Advice, Networking)**
Friends or family	**The Support Approach**

The Curiosity Invite

People you know

> "Hey [Name], I just saw something that made me think of you. It has the potential to make a lot of money. It might be a fit, might not, but I'd love to get your input. When's the best time for you to check it out?"

- ✓ Non-pressure, natural, conversation-based
- ✓ Works best for people you already know or have influence with
- ✓ Keeps curiosity high and defenses low

The Direct Approach

Respects your leadership

> "Hey [Name], I'm working on a business project that's expanding fast. I'd love for you to see what we're doing. Are you open to taking a quick look?"

- ✓ Short, confident and clear
- ✓ Perfect for people who respect you or like your leadership
- ✓ It's a professional invite, not a sales pitch

The Third-Party Credibility Invite

New IBOs

> "Hey [Name], I've been learning from a guy who's been incredibly successful and making a lot of money. He's doing a short presentation tonight and I thought of you immediately. Would you be open to hearing his story? It takes about 20 minutes."

- ✓ Builds credibility fast
- ✓ Great for new people who don't have results yet
- ✓ Leverages leadership and events

THE INDIRECT APPROACH

Earn interest through curiosity and respect

Best for people who might be skeptical, busy or influential. You're appealing to their expertise, not selling to them.

The Opinion Approach

Strong business sense

> "Hey [Name], you've always had great business sense. I'd love to get your input on something I'm working on. Would you be open to checking it out and giving me some honest feedback?"

The Advice Approach

Successful in their field

> "Hey [Name], you've been super successful in [their field]. I respect your perspective and I'm looking for some input. I'm checking out a new business project. Can I get your advice on it?"

The Support Approach

Friends & family

> "Hey [Name], I'm stepping into something new that I'm really excited about. It'd mean a lot to me if you would take a quick look and give me some feedback."

The Networking Approach

Well connected

> "Hey [Name], I know you're connected to a lot of great people. I've got something I think could really help certain folks, and you might even know a few. Would you mind taking a peek so you can tell me who might be a good fit?"

PUTTING IT ALL TOGETHER

"Hey Mike, I only have a minute MINUTE but you came to mind because you've always been sharp with money WHY . Can I share something with you? It may be a fit, it may not. My mentor is doing a short presentation and it only takes 20 minutes SUPPORT . Is tonight at 7 or tomorrow at 7 better for you? WHEN "