

GAME DAY PREP

PLANNING AN EFFECTIVE FINALIST PRESENTATION

The big game is approaching. Not the epic battle of two gridiron giants on a Saturday afternoon, but an equally hard-fought contest to win business from plan sponsors. For advisors who anticipate spending time “on the field” as they pursue new defined contribution opportunities, Lord Abbett offers these strategies for winning presentations to plan sponsors.



LORD ABBETT

SCOUTING REPORT

In advance of the presentation, gathering detailed data and insights about the plan is critical.



TIP:

Lord Abbett can help with meeting prep through the use of our internal resources. Please contact your local wholesaler.

WINNING EDGE:

Gather detailed, relevant information and data to help your actuaries and leadership make informed pricing decisions.

GAME PLAN

A well thought-out, *differentiated* strategy document is essential for each finalist presentation.

Know your audience

Use LinkedIn, Facebook, YouTube and Google to research committee members—and the organization—to gain critical insights about culture, mission statements, business lines, markets, etc.

Master the details

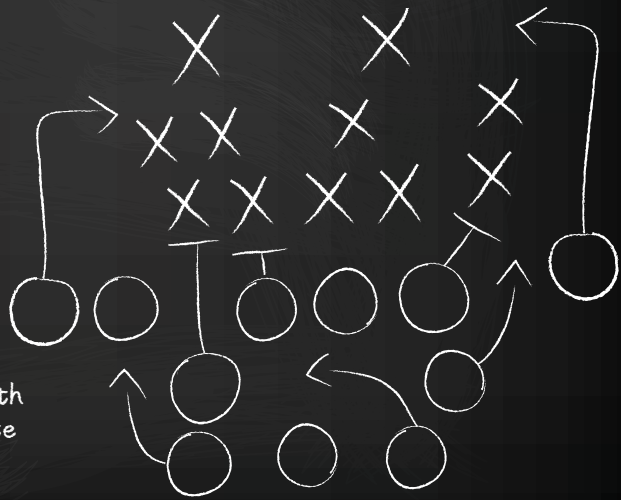
Create a clear, detailed meeting agenda tailored to the plan sponsor's needs. Gather info on the physical setting of the meeting, size and composition of the audience, allotted time for your group, preferences on presentation materials, transportation/parking, etc. Confirm availability of necessary IT resources.

Make it relevant

Align what you know about the company's needs with success stories within your book of business to relate and connect solutions to their greatest challenges. Focus tightly on info that the audience needs.

Practice, practice, practice

Do a couple of walk-throughs. Make sure each team member knows his/her role inside-out. Visualize the environment and practice various scenarios—time allotted, physical setting, audience size, etc. Try to expect the unexpected, and prepare for any difficult questions.



TIP:

Find out the presentation order. If you're first, try to anticipate competitors' key points to "steal their thunder." If last, be sure to craft effective responses to any strategic "land mines" other presenters may put in your way.

WINNING EDGE:

Focus on critical details. As Tom Landry said, "Setting a goal is not the main thing. It is deciding how you will go about achieving it—and staying with that plan."

POST-GAME REVIEW

Win or lose, getting constructive feedback from plan sponsors after the presentation can help boost your winning percentage in the future.

1. Set an expectation with advisors and plan sponsors to **get feedback** within a set period.
2. Ask them to **comment on high and low points** of your presentation.
3. **Request detailed info** on the factors that swayed their decision.
4. Don't hesitate to **ask follow-up questions**. A candid, cordial discussion can help build a future relationship.
5. Convene all presenters for a **thorough debrief** when you have the necessary feedback.
6. Finally, **cultivate an “attitude of gratitude.”** Remember, the plan sponsor deemed your team worthy of a place in the finals. Refocus on how you can anticipate—and serve—their needs in the future.



TIP:

Be sure to send a thank-you with a brief (one page) summary of your value proposition. Sow the seeds of a future opportunity.

WINNING EDGE:

Whether you're an athlete or a financial pro, a detailed “post-game” analysis of your performance can help you sharpen your skills and perform at your peak in future contests!



LORD ABBETT®

INVESTMENT-LED. INVESTOR-FOCUSED.

OUR FIRM

A singular focus on the management of money since 1929

OUR MISSION

Delivering superior long-term investment performance and a client experience that exceeds expectations

OUR DIFFERENTIATORS

- Independent Perspective
- Commitment to Active Management
- Intelligent Product Design

FOR MORE INFORMATION:

Lord Abbett Client Service 888-522-2388 | Visit us at: lordabbett.com

Lord Abbett mutual fund shares are distributed by LORD ABBETT DISTRIBUTOR LLC
90 Hudson Street, Jersey City, NJ 07302-3973