BOOK REQUEST
WORKFLOW GUIDE

"WHAT DO I DO WHEN SOMEONE REQUESTS A BOOK?"

What This Covers:

- What to do when a book request comes in
- What to say on the phone *(scripts included)*
- How to qualify and schedule a discovery call
- Where to log activity inside Advisor Nexus
- How to ship the book from Amazon
- How you're notified when someone requests a book
- Where to find book order details & shipping address

Questions? Email: support@trainedadvisor.com


Book Requested Call Flow
1
Confirm Address
Opening Statement
Confirm Shipping Address
2
Guage Interest & Explore Needs
“What piqued your interest?”
Retirement Concerns Mentioned?
Tax Burdens Mentioned?
Wanting to Learn Something?
3
Light Qualification
Ask about asset ranges
Ask about estimated timelines
Ask about other decision makers
Ask about prior planning
4
Schedule Discovery Call
Discovery Call Bridge
Objection Handling
Offer 2-3 specific times for next call
5
Post-Call Routine
Add call notes in Advisor Nexus
Create Task for manual follow-up & call confirmation
Order & Ship the book from Amazon to the prospects address

1

Opening Statement + Confirm Address

Goal:
Confirm shipping address and transition to understanding their interest

You: *"Hi , is this [Their Name]?*

(Wait for confirmation)

Hey [Their Name] it's [Your Name] from LinkedIn and I'm calling because I just saw your request for [Campaign Book] and wanted to make sure I've got the right shipping address...

Looks like it's going to [read address], is that correct?

(Wait for confirmation)

Awesome, we'll get that shipped out to you asap... and, hey, just out of curiosity..

What piqued your interest in the book?"

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Gauge Interest + Explore Needs

If they mention Retirement Concerns:

- *"How long have you been thinking about retirement tax planning?"*
- *"What's been your biggest concern about taxes in retirement?"*
- *Have you run any projections on what your tax situation might look like?*

If they mention current Tax Burden:

- *"What's driving your interest in reducing taxes right now?"*
- *"How has your tax situation been affecting your financial planning?"*
- *"Have you looked into any tax strategies before this?"*

If they mention wanting to Learn More

- *"What got you started researching tax strategies?"*
- *"Where else have you been getting information about this topic?"*
- *"What would you want to accomplish with these strategies?"*

Goal:

Understand their specific situation through calibrated questions

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You: "That makes complete sense. A lot of the 0% tax strategies can be really effective, but they work best in certain situations, so let me share some things that might be helpful - and I'll be completely honest with you about whether this even makes sense for your circumstances - fair enough?"

Lightly Qualify

Qualification Questions:

Asset Assessment: *"These strategies are most powerful for people with retirement accounts like 401(k)s or IRAs.. do you have retirement savings that you're concerned about the tax impact of when you start withdrawing?"*

Timeline Assessment: *"Are you actively planning for retirement in the next 5-10 years, or are you already retired?"*

Decision Authority: *"Is this something you handle on your own, or would you and your spouse be making these kinds of decision together?"*

Planning Experience: *"Is this something you're working with an advisor on right now or have you gotten help for this in the past?"*

Goal:

Assess quality while providing value and building trust

You: "I'll be honest - if you're more than 15 years from retirement and don't have significant retirement accounts built up yet, you'd probably get more value from the book than talking with someone like me right now - you're better offer focusing on building those accounts first."

Qualification Check Point

Proceed to Discovery Offer	Nurture - Send Call Recap, Check-In 30days	Helpful Exit, Offer Educational Resource
• Has significant retirement assets	• Has some assets but longer timeline	• Minimal retirement savings
• Within 10 years of retirement or already retired	• Beginning to research but not urgent	• Very long timeline with no urgency
• Actively concerned about retirement taxes	• Interested but needs more education	• "Just curious" with no capacity to act
• Open to professional help		

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Goal:

Schedule the next call

Schedule Discovery Call

For Qualified Prospects

You: *"Well, based on everything you've shared, it sounds like these 0% tax bracket strategies actually could save you a significant amount of money over time... The challenge is everyone's situation is unique – your income timing, account types, your state tax situation, your spouse's situation if you're married..*

Honestly, I think its worth a chat. We can take a look at what you're currently doing, try to find some gaps, then ill just show you exactly which of these strategies might work best for your goals, and between you and me, which ones you might want to stay away from...

Kind of like just getting a second opinion – just to make sure you're not missing opportunities.

Would a conversation like that be helpful for you..?"

If Yes:

"Great - I've got some openings [offer 2-3 specific times]. Would [day/time] work for you, or would [alternative] be better?"

If Hesitation:

"Totally understand wanting to think about it.. Mind if I ask what specific questions do you have about having a conversation like this?"

OBJECTIONS
3A FRAMEWORK:
1. ACKNOWLEDGE 2. ASSOCIATE 3. ASK

"I Already Have a Financial Advisor."

Acknowledge: *"That's great to hear! It tells me you're already proactive about your financial future."*

Associate: *"Ya know, a lot of people I speak with initially say they aren't interested, usually because they're thinking it's a long, drawn-out sales pitch. I'm not here to sell anything, but rather see if there might be any gaps in your current strategy, kind of like a second opinion."*

Ask: *"Would you be open to a second opinion of your current portfolio?"*

"I'll Think About It and Get Back to You"

Acknowledge: *"Of course - it's a big decision and you definitely should take the time you need to feel comfortable."*

Associate: *"Typically, when I hear someone say they need to think about it, it usually means I haven't done a good enough job explaining the value, or if there's something specific they're not sure about. Mind if i ask what are the one or two things that are on your mind most?"*

Ask: *"Is it the financial commitment, the timing, or something else entirely?"*

COMMON OBJECTIONS

"I need to talk with my spouse"

Aboslutely! These decisions definitely effect both of you.

Actually, I prefer having both partners on these conversations anyway since tax stategies impact your JOINT situation.

Would both of you be interested in a quick conversation to understand your options together?

"I want to read the book first"

That's a smart approach!

Most people want to understand the concepts first, and what I've found helpful for a lot of folks is having a quick talk about how the strategies in the book would specifically apply to their situation.

Would that be valueable for you?

"I don't have time right now"

I completely understand how busy things can get. Sometimes it feels like there's never enough time in the day!

And many of my clients felt the same before we started working toegther. They juggled so much, financial planning was on the back burner. What they found was a small time investment upfront saved them a huge amount of time and investment in the long run..

If we could find 30min to potentially save you hours of work and worry down the road.. would that be worth it?

"I'm not sure I need professional help"

Totally fair - a lot of people handle their tax planning on their own!

The thing is, though, tax laws are pretty complex, and everyone's situation is different. Even if you decide to implement everything yourself, it's often helpful to make sure you're not missing anything or making costly mistakes.

Would that be worthwhile?

"Im not looking to spend money right now"

Totally understand that concern!

Actually, most of the people I talk with say the same thing at first; they're not looking to SPEND money - they're looking to SAVE money haha.

Let me ask ya this... if I could show you strategies that might svae you more in taxes than what it would cost to implement then.. would that conversation be worth anything?

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Post-Call Routine

*Add Call Notes to Advisor Nexus

Click HERE to view Walkthrough Guide

Log in to Advisor Nexus and navigate to the contact you spoke with.

Add a note detailing what you spoke about, any emotions, questions, concerns, goals, etc. Be as detailed as possible.

*Create Follow-Up Tasks in Advisor Nexus

Click HERE to view Walkthrough Guide

Log in to Advisor Nexus and navigate to the contact you spoke with.

Add a follow-up task to remind yourself when to take the next action

*Order & Ship Book From Amazon

Click HERE to Order the Book

Search for the book title (e.g., *The Power of Zero*) on Amazon.

Click "Buy Now" & enter the prospect's shipping address.

Goal:

Order the book, not letting communication fall flat, & proactive follow-up.

❓How Am I Notified When Someone Requests a Book?

You'll receive an email notification from **Advisor Nexus** when a new book request comes in.

The subject line usually says: **New Book Order** or something similiar

❓Where Do I Find Book Order Details?

Log into **Advisor Nexus** → Go to the "Opportunity" tab → Select "Campaign Pipeline"

You'll see a new contact card in the "Book Requested" Pipeline stage. That's your lead.

❓Where Do I Find Shipping Address?

Log into **Advisor Nexus** → Go to the "Contacts" tab → Search the contact.

Their mailing address is in **Additional Info** on the left-hand side of screen.

❓What If They Don't Answer When I Call?

Follow this flow:

1. Call twice back-to-back
2. Leave a voicemail
3. Send a text
4. Log your actions in Advisor Nexus

❓How Do I Physically Send The Book?

Use Amazon.

Search for the book → Select "Buy Now" → enter **their shipping address**.

❓What If They Say "I'm Not Ready?"

No problem. Use the objection-handling phrases to keep the conversation friendly and open the door for future follow-up.