

Funding Overview

All right guys, in this video we're gonna be doing just an overview on funding before we dive into actually setting it up and getting you guys started with it.

We're gonna talk about who should be setting it up, which is most of you guys, the benefits of it, all that good stuff.

Now, for those of you inside of air, you guys already know the power of funding. You already know how powerful it can be, how it can push those deals over the finish line that otherwise wouldn't be able to get over the finish line, right?

At the end of the day, it's the same reason why you see homeless people walking around with thousand dollars plus iPhones that otherwise they wouldn't be able to afford.

It's the same reason why you see people who are able to spend \$30,000 on solar systems and there's salespeople who are able to close that at 30 to 60%.

In fact, my uncle sells solar and he has an 80% close rate over the last, I think it's two years, right?

He closes 80% of people at \$30,000 and the only qualification is he knocked on their door and they said, sure, I'll schedule an appointment.

Right? The reason why he's able to do that is simply because of funding, right? He's able to finance those deals and allow people in to get in at a much lower rate.

Same thing with cars, right? There's a reason people who make \$30,000 a year are buying \$60,000 plus cars. That's an exaggeration a little bit, but at the end of the day, you see people buying super expensive stuff and it's like, how can they afford that?

And it's because they're not taking 60 grand outta their pocket to buy that car. They're simply financing it, right? At the end of the day, all those things come down to financing.

Now, so many industries that sell high ticket use financing and if they didn't have financing, those industries would cease to exist.

And one of the most powerful concepts you can ever take is something called benchmarking, right?

Where you take a concept that's already working another industry and all you do is apply it to your own.

That's what Charles Koch talks about. He built a hundred billion dollar company from scratch. It started like 12 million a year when he actually got it from his dad.

But basically 12 millions, basically zero compared, compared to a hundred billion. And one of his biggest principles that he teaches every single person in his company and what he calls market-based management is benchmarking.

It's finding something that works other industries and applying it to your own. And that's the same thing we're selling high ticket as well.

It doesn't matter what we're selling, if it's a product or a service, whatever it is in our client business, if we're charging 3000, 5,000, 10,000, \$20,000 for what we sell and we're not offering financing, we're gonna lose out on a lot of those deals, right?

The same way car dealerships would go out of business if they didn't allow financing, the same reason why Apple wouldn't sell nearly as many iPhones if they didn't have financing.

And the exact same reason why the solar industry would completely collapse if there was no financing.

Financing is the ability to let people get into your product or your service for \$0 down or a small payment, and then only have to pay a small monthly fee.

And then it allows them to pay it off at Their, their rate, right? Whenever they want to do it. And the reason why this is so powerful, and the reason why this is so important is most families, no matter how much they make live paycheck to paycheck, right?

It's not that they don't make money, it's that people spend the money that they have. They don't have a ton of cash just laying around.

I think it's two out of three households that make a quarter million dollars plus a year with paycheck to paycheck, right?

So it's not that they're like struggling to pay the bills, but at the end of the day, they spend what they make and they don't have a lot to save a lot in savings.

The average American has less than a thousand dollars in savings. So if we don't have financing, we're gonna miss out on a huge percentage of the deals.

Same thing with business owners, right? You're selling to business owners, a lot of times they're taking all that money and they're dumping it back into their business.

So it's like, although they're making a lot, they don't have a ton just sitting there in a bank account waiting to pay you, right?

So even if they do have the amount to pay you, it's like, man, that's a big chunk because they don't have a gazillion dollars sitting there, right?

They don't have a gazillion dollars laying down. So it hurts a lot more if you're gonna pay have them pay in full.

So allowing financing and making it to where they can finance the deals just makes it so much easier. So much lower barrier of entry for all your clients, for all of your customers, it is an absolute necessity, right? It is an absolute necessity. It's the ability for your business to get paid today while your clients pay for your product or your service over a long period of time.

And really, financing does two things, all right? Does two things. Number one, it makes almost anyone able to afford almost anything, right?

It eliminates the price objections. I know so many of you guys, you're on the phone and you do a really good job selling whatever it is that you do.

You believe in what you do. And at the end of the call, people wanna move forward. They wanna work with you, they want to invest in your products and your services, but you hear them save the dreadful words.

This sounds great, I just, I can't afford it. And at first you feel like, oh, maybe they're just making an excuse and you dig into the truth and it's true, right?

Maybe your product or service is \$5,000 and you dig into the, the, the reality of it and they only have a thousand dollars laying around.

So you set it up on this kind of janky payment plan and it just, you know, a lot of times it doesn't pull through.

So it makes it to where almost anyone can afford anything. And the second piece is it makes your sales process have way less friction, all right?

A lot of the time people, they want what you're selling, right? And even when they can't afford it, they still, it hurts to do it.

It's like, ah, man, I can't afford it. I do want it. But writing that check, when push comes to shove and they actually have to do it right, when they actually have to pull their credit card outta their pocket, they back out.

And I know that's one of the most frustrating things when you're selling something that's a high ticket service cuz that deal's worth so much to you and they back up not because they don't want it, not even because they can't afford it, but because they get cold feet.

Cuz it's a, it's a big sticker shock. It's like man, I gotta part with all that money today. Ooh, I don't know if I wanna do that.

And it's one of the worst things that can, you can ever experience as a, as a client based business owner. So, so why we have to have financing in place, it's why it's so important at the end of the day, think about it.

Which offer do you think is gonna have a higher close rate and require more skilled sales reps to sell the thousand dollars iPhone that someone has to pay for in full and they have to have all the cash on the spot

or get the latest brand new iPhone, don't pay anything today and then just trade in your old phone and to pay 19 bucks a month.

Which one's a better offer, right? It's this one. One of the things we talked about when it comes to pricing your offer is that people pay for a result, right?

And if the price to value discrepancy is high enough, right? They the value of what you deliver is higher than the price that they're paying than they're gonna buy every single day.

And one thing that funding does is it makes it to where the price all of a sudden seems lower but you still get paid the same amount as the business owner, right?

This seems cheaper, but guess what? You still make the same amount as the business owner. So by adding in funding, not only does it make it more accessible, but it makes it more irresistible cuz the value's not changing but the perceived price is, and when the value doesn't change but the perceived price goes down, what happens closer rate goes up, it takes less skill to get the deal across the finish line. When those objections come up, it's a lot easier to handle 'em and a lot of times they just don't come up at all.

People go from complaining about the price to not really thinking about it. People stop asking, can I afford this? And they start saying, do I want this?

And if what you sell is valuable and it's able to get them the result that they want more than anything else, what do you think is gonna happen?

Right? You either gonna buy every single time. So that's just the reality at the end of the day. Same thing with solar.

\$30,000 versus \$0 down and 70 bucks a month, which one's harder to sell? Who's gotta be the better sales rep?

<laugh> the guy selling this or the guy selling this, I literally asked my uncle who has a seven or 80% close rate selling solar and he's taught thousands and thousands of people across the country basically how to sell solar, right?

He's made people millions of dollars showing them how to sell solar. And guess what? I said, what do you think would happen if you could no longer finance the deals?

And he literally just started laughing. Like he literally started laughing. It wasn't even a question. It wasn't like well I wonder if we could make it work.

He's like, the solar industry would go out of business. A multi-billion dollar industry would go out of business if you just got rid of financing.

And the reason why is this is too hard of a sale to make. No one's got 30 grand laying around but everybody will do \$0 down and 70 bucks a month to save some money, right?

Cause it's a good deal for them. Same thing with car dealerships. Selling cars. Which offer do you think you have to have a higher is gonna have a higher close rate and is we're gonna require more skill to sell the \$60,000 car or the \$0 down \$500.

\$500 a month car with trade-in, right? Which one's gonna be harder? It's gonna be this one all day, right?

I don't care how good you are at sales, the guy selling this is gonna have an easier time than the guy selling this, right?

The guy selling this is gonna struggle because there's so many objections going on. Number one, they can't actually afford it.

Number two, even if they can't, it's such a big chunk of money all up front versus this one we're lowering the barrier to entry without decreasing the value.

So that price to value discrepancy because of funding is so much greater, right? This is why we pitch funding to every single client regardless of how much money they have.

Because guess what, if someone has a hundred grand in cash, right? And someone has \$0 in cash, you still wanna pitch both of them.

This one right here. Because even though the guy with a hundred grand can afford this, it's no big deal. He can technically pay for in cash two times over almost.

It's still a more painful sale, it's higher sticker shock, it hurts more, there's greater friction. So the same reason this is easier to sell than this, the same reason this is easier to sell than this, the same reason this is easier to sell than this, the same thing applies with your offer, right?

That is why we are doing this with your offer. That's why we do focus so much on that here at air because it makes such a big difference.

It's one of those levers you can pull on that allows your offer to become so much more irresistible and increase your close rate so much without even getting that much better at sales, right?

Without, without tweaking anything in your offer, you make the price to value discrepancy so much greater. You make it so much more of a no-brainer right?

Now who does this work for? Right? Who should use funding? The answer is anybody who can, right? Is many people who can should use funding.

Anyone who sells a high ticket package, right? Any package at all that's high ticket, you should be using funding, no ifs, ands or buts about it.

Now one of the benefits of selling packages versus pay per hour or monthly retainers is this, right? A lot of people what they do is they're charging their monthly amount or even worse they're charging their hourly amount.

But what we wanna do is we wanna sell in packages instead. We talked a lot about this when it comes to actually creating your offer and the reason why is because when we sell a package and we're able to finance it, what happens is we get more money up front and it just makes it way easier to scale, way easier to scale.

And then also there's guaranteed retention when you're selling pay per hour for monthly retainers, people can drop you at any moment, right?

They can stop paying for the next session. But if we sell six months up front of our consulting or whatever it is we sell, we get guaranteed retention and the deal is financed to where they can pay it off at whatever, you know, rate is convenient for them, right?

You won't have people stop paying after a few months or a few coaching sessions since you're selling it in bulk.

It's much better to do it that way, right? So much easier and then they don't feel like they gotta pay 20 grand up front because guess what?

They're just paying a small monthly amount and it just makes it so much easier. Now again, here is the exception to that rule, right?

If you are in this and you're able to offer financing, like you have a package of some sort, whether it's a product, a service, whatever, you're gonna do funding, right?

You are gonna do funding. If you were doing pay per hour before or whatever when you created your offer, you should be creating something that's like five 10 k plus and you're gonna use financing.

And the only exceptions, those who shouldn't use funding on their deals are maybe ad agencies, right? If you have like an agency and the only reason why I say don't do funding is not because I wouldn't if I could, but it's just that a lot of times they're kind of a commodity and a lot of times with an agency people wanna do month to month rather than selling six months up front or a year up front.

Like it's difficult to sell that long of a retainer purely because in those businesses a lot of times you're kind of re-earn the business every month.

Like you're fighting to keep the client every month and they're hesitant to agree to six months up front. So if that's the case and you're doing like an agency type model and you haven't yet shifted over to a very scalable fulfillment, which by the way that's our goal, I want all you guys to get into that place so you can scale the eight figures without really struggling with you know, a bunch of fulfillment model necks.

And if you're just like an ad agency, that's definitely a more difficult task to do. I only know a few people who've done that effectively.

But we can shift over that fulfillment and go over the, you know, the scalability aspect of creating your irresistible offer and you can tweak that.

But for now, if you're doing an agency and like funding doesn't make sense just quite yet, you can keep your current model for now.

Again, another note for agencies, get your clients to use funding so that they get better results, right? If you're running like an ad agency and you're helping clients get them on funding and the reason why is cause it's gonna make you look good, right?

As an agency, like I said, one of the hard parts is you're rerunning the business every month and a lot of times you can do a lot to get someone results, but a lot of times the results aren't purely in your court.

So one thing you can do that's gonna help you get your row as up for your clients is simply having them do funding, right?

A lot walking them through a lot of the process you learned in here, treating like your business and saying, Hey, make this tweak, this tweak and this tweak and all of a sudden it's gonna make you look a lot better as the agency, you're gonna increase your retention.

It allows you to charge more. Because guess what? You're getting them better results. At the end of the day, that's what people are paying for.

Whether you're an agency coach, a consultant, or any other client based business owner, people are not buying your deliverables, you're buying the result that you deliver.

That being said, guys, this is just a macro overview. I know going into this video, a lot of you guys already know this, a lot of you guys are already excited about this.

A lot of you guys are already chomping at the bit to implement this in your business cuz the moment you implement it, like you can go back to your entire pipeline of all your past leads and be like, hey, there's a zero down option now and you can get so much quick win, so much cash collected off the bat that it's just a really, really, really fast win.

So there's that. And then also going forward, you're gonna miss out on a lot less deals. Closing deals is gonna get a lot easier, it's gonna get a lot, lot more fun.

Those objections that used to throw you off that made you feel like, man, I'm so close to closing this deal but they just can't afford it.

Or I'm so close to closing this deal, they can afford it but it's just too high of a sticker shock for them.

Those deals are gonna slowly start to get or actually quickly start to get pushed over the finish line the moment you implement all these funding SOPs that we do.

So once you get funding set up and then you learn how to handle the simple funding objections, right?

There's a couple little objections people throw your way throughout the funding process that are much easier to handle than the I can't afford it.

Objection. And you guys are gonna learn how to handle those, how to do the funding process and literally all the things that we've learned pushing millions and millions and millions and millions and millions of dollars through funding, right?

There's a reason why we push every deal through funding, not just the deals who can't afford it. We push everything through here cuz it just makes the process so friction free, it makes selling it so much easier.

It makes the calls go quicker. Everything is just easier and better with funding, right? If all these big billion dollar industries would go out of business without this one thing, there's probably a pretty good reason why they're focused on it, right?

And there's probably a good reason why we should focus on it as well. So we're gonna commit to using funding on all of our deals.

Like any deal you can push through funding, right? It is the best first line of defense for getting a deal over the finish line because if you're trying to push someone over at a paying full in cash, it sounds like, oh, that's fine if they have the money, no big deal, but you might kill the deal.

There's no reason to risk a deal trying to get a pay in full when instead you can get them to do funding funding and get all the money up front anyways.

And then they have a small payment and they can pay it off when they want, right? We have some people who decide to pay the minimum amount.

Other people they want to pay it off in full, but they just don't have the money this month. So next month they pay it off in full.

But either way, you as the business owner get paid up upfront and that is what matters. And the reason why that matters is it allows you to scale more.

It allows you to recoup ads spend faster. It allows you to pay sales reps more because rather than them getting this tiny little commission, they're getting the full size commission off of deals that otherwise wouldn't be able to afford it.

So you get better talent, you scale the ads more, everything's better, you have more cash flow in the business, you can take more profit out of the business and you are gonna be in an amazing spot as a business owner.

How The Midas Admin Panel Works

Hey everyone, welcome to air today. I'll be walking through the midish checkout and financing platform and explaining how you can use Midas and how you can use Midas to scale your business and generate more Revenue. So first step, you'll visit midas.air.ai will send you an invite email that you can just tap on and you'll enter the email that we used to invite you. So for me, I use DB at air.ai and I'll click continue. And then it'll send me a one-time magic link to my email that I just have to tap into. And then that'll take me straight into Midas and I only have to log in once once you're logged in your permanently set and you won't be logged down. There's no passwords no hassle. So here we are logged in we're logged into our test account Disney seems like Disney hasn't had a very good month. I guess they haven't

been using air, but I'll sort of walk you through exactly how this works. So up here. You see some basic statistics. You can break this down over time.

Down here. You'll be able to see your entire customer table. So once we create a customer in a second, you'll see a customer pop up here and you can see some statistics in their status.

You can also refresh customer statuses right here. We unfortunately don't have any yet. But once you do it, all the data will be refreshed and you can also search so if you want to search John Doe we could type in here and they pop up.

So the first step besides creating a new checkout is that you can manage your team. So if you tap up here and you click the settings icon only if you're an admin you can then see exactly who's on your team. And you could either make them a closer or finisher which are roles that we have where you can create new checkouts and manage checkouts, but you can't add a remove anyone on the team.

However, I'm currently an admin which allows me to invite and remove other users. So for example, I'll click add a user and I can invite John though.

I could choose his role and I could invite him. To Midas. There we go. So and also too if I want to remove John I could come here I could click remove.

And we can get rid of John. So let's dive in to creating a new checkout. So you just click new check out up here. And we can type in John Smith.

So let's say you have a customer named John Smith. His name is John Smith. His email is John Smith demo. at air.ai we'll type in a random email here.

Or a random phone number and then here where we can enter the amount. So let's say we wanted to check out for \$10,000. And then let's say that before he does any final instrument or whatever. We want him to put a thousand dollars down on a credit card or via ACH we can put in a thousand dollars here.

And then Flex down as a feature. We'll talk about a bit later. But for now we'll put in a thousand dollars. Then you have four other options. You can do pay plans only. So if people are expecting to take out a

mortgage or a car loan soon, they might not want to hard inquiry on their credit so you could make it a pay plan only.

You could also skip the sales agreement if the person's already signed a sales agreement outside of Midas. You could do loan only if you don't want the person to accept a pay plan and heads up how a pay plan works is that your business won't get any money up front. But the person will pay you let's say two or \$300 a month until they're quote unquote loan is paid off.

That custom term allows you to change the length of those payment plans. So if someone doesn't qualify for a loan or if you payment plan only you can then do a custom term. Our default is 60 months, but you can make it so that hey I want this person to pay off \$10,000 over just 12 months instead of 60 months. So that's completely up to you. But for now we'll turn that off.

We'll turn off. Hey plane only and we'll try creating a checkout for John. You just wait three seconds and boom here. We have John's personalized checkout link. So for Disney, we have it at example merchant.com and check out ID. You can just tap this to copy and then you could text it to him or email it to him or whatnot, but you could also click send via SMS or send via email and will auto text or Auto email it to the email or text

or phone number that you just put it. So for now, we'll just copy this and then we'll open up John. From his customer popup. We can do a few things we could edit the amounts so we could drop this deposit down to 500 dollars. We'll throw this back to a thousand dollars of this demo or you could even change his name or fix a type on his email.

From here. We'll just copy this link and in the next video you'll be able to see exactly what it looks like from the consumer side. And I think that'll give you a lot of context on exactly how to best use Midas to grow your business.

How The Midas Flow Works

Okay, so in this video I'm gonna be giving you a tutorial of the Midas flow so you can kind of understand what is possible as far as checking out and funding deals via Midas.

Now what I did is I had Diego who is super closely involved in building out this entire flow. He worked with all the devs and every one of them obsessed on making this as clean as possible and basically giving your customer the best experience while having the shortest amount of time for you as a business owner to get that customer to pay in full.

That way they can get set up, they can get onboarded, you know, they stay excited. Everything on the call continues to go smoothly and you're able to get into your next call.

So I'm gonna go and play this video from Diego and now I'm just gonna be here for commentary to kind of like jump in with you know, anything that I wanna clarify and kind of just, you know, overall give you guys kinda the psychology behind why some of this stuff is in place.

So without further ado, let's go ahead and let Diego dive in. Our, this is what Mighty looks like on the consumer side.

It might look familiar. We're using our checkout link that we just created for John Smith for \$9,800 in total with a thousand dollars deposit.

We can see that we use Disney up here. So it broadened all of Disney's colors, broadened Mickey Mouse. And one thing to note that you guys probably know at this point, but this entire flow is customized to your business.

So the same way this says Disney, it'll have your logo, same way this has Mickey Mouse, it can be one of your logos or a picture of you, which is actually what we do.

We found that psychologically if there's a picture of someone's face right here, just increased trust in the overall flow. But this will be fully customized to you as well as the color scheme.

Yes, brought the Disney logo and this will all be hosted as a sub domain on your website. So the first step if you added a deposit is that customers will pay the deposit.

So here we have a thousand dollars deposit and people can either put it on one payment method where they can split it across a credit card or they can put it on a bank account so they can click ACH and then we allow them to connect it to a different bank account.

I'm into By the way. One of the reasons why we personally took the time to actually build it out to where you can get ACH right there on the spot is cuz a lot of times people wanna send us a wire or whatever it might be.

And usually you have to go through this lengthy process, you have to go outside of the flow, whatever it might be.

With my diffs, you can literally accept wires right here on the spot just by collecting ACH info and issue it right here, whether it's a deposit or painful, however you wanna have it structured.

Now just to make things easier for this demo, but they would essentially just tap here, they can then connect their bank account and boom, they're set or they can split it across two or more payment methods.

So they can click split across two or more and then they choose the amount to put on card one. So, we'll the \$500 on card one I'll put in our dummy card.

So I don't know if to spend \$500, you wait a second and boom, now your remain balance is \$500 and it asks you how much you wanna put on card two.

So what, so guys, this is a super simple feature but this is one that was really important to us. Cause I mean how many times have you been on a call and someone has the money but let's say it's on two separate cards or they, you know, have a limit on one card card or they only wanna use a certain amount so their utilization is at a certain level.

And so we basically set it up to where as many you know, options as your, you know, customers want, if they wanna put on five cards hypothetically they could, they're just able to split it across multiple method methods.

They could do you know, ACH and then put it on a card. Like literally whatever they wanna do to get across the finish line, it's totally up to them.

Which is really the big thing that we wanna do with MyDay is we want to give our customers options and let them make the decision they wanna make instead of being kind of forced based off of what we have the technological capability of doing on the call.

\$500 on card two as well. And these are all the payment methods that are supported by the way. So we support basically every major card, ACH and even Apple and Google Pay.

So we'll put a \$500 on card two and boom step. Now before we dive into the second step, one thing I'm gonna clarify as far as the deposit goes cuz that's obviously the deposit page is if you don't want to collect a deposit when you're basically creating a new checkout inside of minus, which is super simple, there's only a button in the top right corner, you click and you're creating a checkout, all you have to do on the deposit side is put \$0 and it'll just skip that page automatically and you won't collect any deposit.

And that's what we do internally. We recommend that you actually do \$0 down but for some of you who you know makes more sense for your flow, you test it, whatever and you wanna have a deposit, you do have that option.

And then hypothetically, if you just wanna get the person to pay on the spot, like that's the route that makes the most sense, they wanna split it across two payments.

They wanna do an ach, you can literally just put in the deposit amount as \$9,000 so the full amount and then you put \$0 on the funded amount.

So like it's literally completely in your court. If you wanna get a painful on the spot, you can do that.

If you wanna do a deposit plus funding, you can do that. Or if you wanna do it like we do, we do \$0 down and go straight into funding.

We found that's what works best. In fact we've actually tested a lot. We originally did a thousand dollars down and then let's say we would do eight K or 14 K or whatever the remainder was through funding and we found that it really didn't increase conversions that much and it was better just to get straight into the actual funding side of things.

So that one's totally up to you what you wanna do, I recommend \$0 down but if you have any type of system already in place, you know Myis can basically support whatever you currently have.

Covid is gonna be applying for funding so all people have to do is they have to put in their street name.

So I'll just put in dummy info for now. Citizenship status, you put in your birthday, then you can guess your credit score, you put in your job status, annual income and then the final step is you put in your social security number and we blur it, which helps customers feel a bit safer when they go through.

Then all you have to do is click see my funding offers and we cover all your legal bases down here for now in we're in testing mode, we're just gonna pretend that I got back awesome offers which happens around 60, 70% of the time.

So we'll click see my funding offer and boom, here we go. So it says Congrats, you're in, welcome to Disney.

And here it's gonna show basically all the offers and if you remembered we did a \$9,800 checkout with a thousand dollars deposit.

So that means that since we already paid a thousand, all that stuff is 8,800. So we then have a ranking algorithm that rates rates the best offers.

So at the top we have an \$8,800 offer from SoFi is super low interest, 84 months and the monthly payment is just gonna be \$181 a month or we have an offer from Best Egg, we have more offers from SoFi and people can even click view all offers and see every offer they got.

It looks like in this example offer it even went up to \$13,000. And one thing I wanna know by the way is at the end of the day, whatever is best for the customer, whatever they want, they can just choose that option.

The ranking algorithm is really just to make sure they're getting the lowest monthly payment and it's kind of based off of what we know that customers naturally want but they can really choose any of these options that'll work.

And then also you can see sometimes they're gonna approve for more than you put them in for and so say you know, you put them in for 8,000, they get approved for 13,000.

One of the things you can do, especially if you offer some sort of you know, business service or anything of the sort, you can literally say Hey by the way if you want to take out more than the 8,000 you can do that.

And then you also just got \$5,000 in funding you can use for other things or you can use get started with the program.

Like if you have a a program that has some startup cost outside of just investing in whatever program you have, you can also get them to take out some extra capital there if that's something they want.

Again, totally up to the customer, whatever they prefer. That's also something to keep in mind, we have done that before is like hey if you wanna take out 5,000 you can also throw that in ads or you know, whatever it might be.

That's totally up to you and kind of just give 'em that option. They can search through and really quickly they'll see all the options.

They'll choose the one that makes the most sense for them and feel like you know gives them the things that matter to them and literally they're on to the next step.

We'll just show the one that we think would be best for your customer. So if they like this one for example, they can just tap next step.

We just did a super short sales agreement here as an example, but we will load in your sales agreement if you provided us one and assuming you asked the consumer to sign a sales agreement and you didn't click skip sales agreement.

So we'll load it in. One thing to note by the way, you notice that the sales agreement comes after they get a funding offer and this can actually be done however you want.

The minus flow is completely customizable. We have in the past done it to where the sales agreement actually goes and the very beginning of the flow so they felt the sales agreement and then they do deposit whatever it might be.

So if that's what you want, you can just let us know, message us in your Slack channel and let us know that's how you want it to basically be structured.

But the reason why we actually put the agreement here is we found that with the cleanest flow for the customer, we found that by the time they actually get through the funding offer they've already seen it.

Then it's like okay, like I can actually make a decision. I know that I can get in, I know that I was approved, like it kind of just like is the the easiest place and we've split tested it.

This is like by far the cleanest flow. Have the agreement right here in the process like after they see a funding offer they sign the agreement and then they can actually go through and officially get the funding offer set up.

But ultimately you know, we can customize this flow however you want. Hypothetically you can do funding and then get a deposit at the end if you wanted to.

Like the flow is completely customizable to you. We've built that way specifically cuz you know everyone has slightly different sales process but if you don't have any preference, I recommend you put the sales agreement exactly where we're showing you right here in this video Joel, your terms and we'll even personalize the amounts or the bar's name or whatnot down here.

And all you have to do is they can click scroll down and all they have to do is click sign.

So here's how this works. The lenders will send the funds \$8,800 in this case to the consumer's personal bank account.

So we have them connect their bank account to PLA so that once the funds hit from the lender we can automatically detect them and pull them in.

And then essentially I will say this is a massive future and something that we were super pumped that we cracked the codes on and actually implemented.

Because one of the big things when you're on a call like this and you're running someone through funding is a lot of times because the money's being sent to the customer, you know you can't actually onboard them yet, right?

Because you don't know like if the money goes them, they decide to use it for another purpose, whatever it might be, you can't actually onboard them.

But because we not have it structured where they can connect their bank account and we can actually detect when the money hits and compliantly route that to us as a business owner and like consider a sale right here.

The moment they connect plaid we can consider them a painful customer and instead of waiting, you know a day or two for the funds to hit, they're now an official customer.

We can get them onboarded, the customer's happy cuz they get instant access and they're at the peak of wanting this right here in the process.

And then us as a business owner, we get the money and it's almost like the money is being sent to us.

We just have to wait 24 to 48 hours or however long that it might be. So this is a massive feature that just makes it so much cleaner for you as a business owner and also for the consumer.

All they have to do is connect via plaid, they connect via plaid, it's all set up and then help break down in a second.

If for some reason it can't get connected via applied, which is very rare, he'll explain what we can do in that scenario.

Sweep them and then disperse them out to you so you can get your cash. So we normally suggest that consumers connect their bank account with Plaid.

So they'll click here, they'll click get started and all they have to do is just select their bank. So on mobile for example, if you tap Chase it would then open the mobile app and you just tap two buttons to confirm and boom you're in.

If for whatever reason consumers can't figure out how to use Plaid or if there's an issue, which is incredibly rare but it does happen, you can just tell them to close outta here, then they click have a funding code and then they'll type in 2 41 and it'll always be 2 41 then they just have good to go.

So to clarify that real fast, just to make sure you know everything's super crystal clear for you, the way it basically works is you'll start by connecting them to Plaid and again that sets it up to where the moment the money hits their bank account it can basically be sent back to you as a business owner.

So they're paid in full in the spot and you don't have to wait multiple days to consider them a customer.

If for some reason their Plaid doesn't connect, which does happen every once in a while, maybe the bank that they have isn't, you know, on the Plat platform or for some reason there's some sort of tech issue or anything of the sort.

In that case you would click the funding code option and that's based on our backup plan. If Plaid doesn't work, it's a little bit more manual but it still sets up we have the same functionality.

And then just something interesting to note and again if you ever forget this for any reason, you can mesh this on Slack, we'll make sure you're fully taken care of and you like fully understand this.

But basically all you have to do is tell the customer, Hey, it doesn't look like Plaid connected. If you just click and have a funding code, I can give you a funding code.

We can actually set this up slightly differently. They click that and you say okay the funding code is 2 41 and that is the funding code we have for every single person.

So it doesn't matter, you know what company is using Midas, the funding code is always 2 41 if they put in 2 41, if you get that funding code, it gives 'em the opportunity to basically connect their bank, you know manually by putting in the routing number, account number and confirm the account number.

So this is something that as you expand your team and you start to have you know, team members that are actually doing this or if you already have team members in place, you need to relay to them basically how this works.

Have them watch this video and make sure they know if it doesn't connect via Plaid they need to give the customer the 2 41 you know, funding code, have them put that in and then it'll take them to this screen.

So that's just something to take note of, maybe write it down. And just remember when you do have people that are coming on and actually doing this for you, they need to know about that 2 41 code, which is what our team does.

We make all of them wear, you know, if this happened, just give 'em the 2 41 code and it takes them to to this page And then we ask them to manually enter their banking information.

So they type in their routing number, their account number, confirm it again, they click submit and they'll be bounced out and redirected to the lender.

So once they reach the lender SoFi, in this case it takes around two or three minutes to get through.

Sometimes five, 10 minutes if so, if I ask for documents.

But it's generally pretty easy and boom, the funds will be approved, they'll be sent and you should get them within 24 to 48 hours.

So it's super seamless and pretty easy. So now I'll kind of show you what it looks like if someone doesn't get an adequate offer, which happens around 30% of the time depending on your client base, they'll then see this screen a term assuming.

So just to clarify again, make sure everything's super clear, what Deigo is now showing you is if for some reason when they put in the information to get approved for a funding offer, if they didn't get approved for a tier one offer, which means you know, basically they didn't get approved for you to receive all the the capital upfront.

So like in this case scenario, this would be someone who he typically has a little bit lower credit score, maybe high dti, something of that nature.

Again, not majority of prospects you're gonna talk to, but there's definitely gonna be people that you do run through the Midas flow that for some reason do not get approved for you to receive the funds up front. And so what's really cool about Midas, because we still know that there is value in those customers, we've kind of have a really creative way to make sure that you're still able to monetize those customers. So you're even getting, you know, customers to come in who necessarily wouldn't have gotten approved for four before. So basic minus is structure where you can approve anyone through the method that Diego's about to show you Turned on a mode that we call flex down.

So in this example, if you remember we said Flex then to a thousand dollars. And the reason we do that is because this is the in-house financing option, which means that none of the 80 plus lenders return back an offer.

So instead you're gonna offer financing to the customer yourself. And what this means is that you don't get any money up front from a lender, but the consumer is legally obligated to pay you \$200 a month, let's say for 60 months until they pay back the full \$8,800 quote unquote loan that we call a retail installment contract.

So for that reason, a lot of merchants wanna collect some sort of cash down before they let people do the payment plan.

So you can do a thousand, you can do \$5,000 down and then you, you take on the risk for the rest.

But in this case we'll just do a thousand and then what they'll do is they'll finance the rest at 60 months at 17.99% apr.

So to save you time, So to make this a little bit simpler cause even as I'm watching this, I can tell this is probably a little bit confusing to make it super simple, you'll notice when you create a checkout link from light, it gives you the opportunity to put a flex down number.

So basically what that means is what flex down means just to kind of, you know, make sure that's a clear definition.

If for some reason the customer that you're running through gets disapproved in funding it then basically gives them the option to put a certain amount down and then kind of go on a payment plan.

If this is actually something that one of our team members recommended because basically what was happening is they would run someone through funding, then we could disapprove and then the only option they kind of would have at that point is to put them on some sort of monthly payment plan but they started to realize they could collect a little bit more up upfront and kind of like since you're not getting, you know a hundred percent of that money up front as a business owner, the more that you can get up upfront the better.

So basically the way that it's structured is, you know, if someone gets disapproved you would've already put in a flex down amount.

Let's say it's like okay, I want to, if someone gets his approved, I'm okay with them putting \$3,000 down and then paying \$300 a month or something like that.

You would just put in what the flex down number is inside of the checkout and then once they get disapproved it would then ask them to put, like in this case he set the number as a thousand and would then ask them to put a thousand dollars down and then basically have a monthly payment every month after that so that the client is getting funded but not for the full amount.

They do have to put some sort of deposit, you get the deposit up front, which is good cuz you collect more money now.

And then also they're on a monthly payment plan which is also, you know, obviously valuable because you're getting that every single month.

And I'll break down why the payment plan has a higher pay rate with us then pretty mu pretty much anywhere else that they're gonna go.

So that said, if you still feel confused for you know that specifically for any reason you can mesh us on Slack, we'll make sure you have clarity, we'll make you understand and we can even kind of think through what the best flex down number might be for you.

We saw how this payment stuff works, we'll just do one payment method and we'll put it on a credit card. So we'll type in this test card, we'll continue Plan Company New Life Financial. The APR is 17.99% and it's 60 months.

And if you remember correctly, we did a \$9,800 checkout and since we did a thousand dollars deposit and a thousand dollars flex down, this is only \$7,800.

And so to explain what's happening here is a new Life is actually an internal lender that we have. So this is basically our in-house option that we have in place.

And so with New Life, this is only for leaders that got disapproved already. So there's no way to collect the capital upfront.

And basically the way that it works is for the consumer, it's the exact same thing as getting a normal loan. So they're basically paying and now they're on a monthly payment. So whereas, you know, let's say they go through SoFi as an example and get a loan through SoFi, they're now paying SoFi \$200 a month. The only difference here is they're paying us \$200 a month and then that goes directly to your business. So they're basically paying you \$200 a month.

And the way it works is, and one of the reasons why, you know, new Life has a higher pay rate than just doing, let's say a payment plan through something like Stripe is because the pay plan reports to the client's credit.

So for any reason the client does not pay a monthly payment that would report to their credit just like a typical loan.

So instead of a customer coming in and being on a payment plan, deciding not to pay and they don't lose anything cause they already got access to your, you know, program or your staff or whatever your service is, they now have an incentive to actually pay you every single month.

And even if you look at it, the national pay rates when somebody reports to someone's credit are extremely high. It's like above 96%, it's like the average pay rate.

So on a \$10,000, you know loan that would be \$9,600 in in that case. Now obviously I can't say you're gonna get 90, you know, 6% every single time.

That's definitely not the case. But that said, you do know if it reports the client's credit, they're naturally gonna have a higher pay rate than they typically would on a typical or normal pay plan.

And so that's what we do internally is we basically have it set up where we get people approved. If they can't get approved, they're in the percentage to be, don't get approved, we set them up on this in-house option.

If we wanna do flex down and get some percentage up front we can, or sometimes we'll just straight up have them get on a monthly payment.

We're now collecting that every single month and it has a, a decently high, you know, pay rate and it's not even on disqualified leads we're collecting money.

It just so happens that we're collecting that over a long period of time. And also with Myas we're working on some interesting stuff internally to where we can actually potentially and obviously can't make any promises, but I do, when you guys kinda know what's on the pipeline, it's potentially start to take these payment plans that are set up on this in-house option through New Life and actually start to sell that to where you do start getting some of the percentage up front.

And so we might be able to go lock in a deal with a financial institution and go take, you know, a million dollars worth of your new life deals and get you \$700,000 of that up upfront.

And so that's another benefit of this is over time we might be able to start getting more and more upfront as we start to have history of seeing how your in-house payment plans are basically performing.

Again, if you have any questions, feel free to you know, shoot us a message via Slack, we'll make sure you get full clarity.

But overall, basically easiest way to think about it is New Life is just like a normal payment plan you would set someone up on.

The only difference is it reports to the client's credit. So they have a higher pay rate naturally. So the monthly payment will just be \$198 and 3 cents.

So people can just click next step. Then what we do is we ask 'em to set up autopay so they can just put in their routing and account number.

Then we ask them a few final questions that are Lending Partners require, we'll just pretend I work for the US government.

Then you click continue and boom, here's where you see the retail installment contract, which includes a bit of required info on the on the in-house payment plan.

We can scroll down. And so basically for you know, compliance reasons, anytime you do the in-house payment plan option via New Life, they have to sign something called a retail installment contract.

And so they can just read through this, they click sign now, super seamless process and then now they're officially on the in-house payment plan And we can sign this only pops up if someone turned on autopay, we can scroll down the sign and boom, that's all there is to the in-house payment plans.

It's super quick. So then we show a bit of information, we show the confetti and then we also allowed 'em to learn a bit more about tify, which is the company that we partner with the service, all the payment plans.

And you're able to use Unify completely free through minus. So yeah, you learned about how deposits work, how applying for funding works, the two types of loan options, either real loans or the in-house payment plans, how consumers can sign sales agreements, connect their bank account, fill out the funding information and boom, and how you'll even collect the money.

So yeah, hopefully it's pretty simple, it's a super fast process for consumers and if you have any questions, we'll be there every step of the way to help and make sure that midis is perfect for your business.

Thanks. All right, so that's an overall breakdown of the midis process, the Midas flow. Obviously as we get more into this section, we're gonna show you exactly how to present this to clients, make sure that you're able to move people through super, you know, cleanly, but overall that's how the process works for Midas. You know, start to finish, how to get them approved for the actual funding option, get all of it up front or if for some reason, you know, kind of how to downsell that's the entire process from start to finish.

And again, like Deco just said, if you have any questions, let us know. We wanna make sure this is completely clear for you.

I know what it's like whenever you get on a new software and you're just like trying to understand everything and use it effectively.

We use this every single day. It is one of the reasons we have the CAS collected that we have. It's one of the reasons why we've been able to scale the business the way that we have.

And so we are the best practitioners when it comes to Midas. We've matched this process and we are here to help you out if necessary.

Bonus: High Level Overview

What's up guys? In this video? I'm gonna walk you through these step-by-step process on how you can extract multiple five to six figures plus out of your pipeline in the next 14 days. Now, this is an incredibly powerful strategy for its extracting Capital right out of your pipeline and getting the easiest lowest hanging fruit deals that are sitting there wanting to get your into your program wanting to join it or for some reason over the past one three six months

have been able to and a lot of these can be due to finances which is the perfect person to go after and get into your program because now you have Midas now you have funding negative the ability to get them in the program. There's your dollars down just a few hundred dollars a month. And so in this video I'm walking through. You know, how I closed 41,000 in Lost deals in a week using this strategy as a Setter. I never close before I'm gonna show you also the four main groups people. You can push a ton of Revenue with very quickly using this strategy and those four are gonna be people who are on paper plans currently guys, you're paying you thousand dollars a month five dollars a month and you're gonna be able to get them in.

And help them save \$800 a month. On funding right or \$300 a month or however much it is he's gonna be easiest quickest Pips because they're already saving money each month by going through funding. Is it like that the easiest pitch you're gonna ever have because they're already in there anybody program a lot of them to get an afford the entire thing up front. So that impairment plan you get to give them the ability to get lower month

payments and they'd be so pumped about that the second group people they're gonna go through and reclude is people say no because the price is too expensive that you know, they couldn't afford it right those people who not everyone has 10K liquid, right? They can't necessarily afford it or 10K liquid for them is too much to put up front, but we want to do exercise per month.

The third person the third group people are gonna be who want to do the program, but they didn't have the cash, right? They didn't have you know, however much cash that you need to pay for. The program didn't have that and they couldn't afford the monthly \$1,000 month payment plan. Whatever that was.

The fourth people are gonna be people who are on the fence for some reason they talk to you they said no, they're uncertain. It wasn't a good time. Whatever it was, right, they fell off they weren't cold in you but they're on the fence waiting for an opportunity to get back into your program. They haven't solved the problem that they're they're solve and they're ready to buy and all you have to do is reach out to them and help them facilitate that decision and get

them through the finish line. So we're gonna walk through how to use max plus some incredible texting sequences we have for you guys the tap into all for these groups and collect multiple five to multiple six figures within how big your pipeline is the next 14 days. So the macro strategy behind how we're gonna do this is really simple, we're gonna use texting templates that are automated Mass send them out to you know, your entire pipeline different groups.

We have them separated by the group. You're gonna reach Know plus we're gonna use max up on dialing the list to get people from the above four groups back on the phone with you. Then once they're back on the phone with you at that point, you're gonna go through the re-closing process and send them to minus for zero dollars down. That's that's the key point in this process that these people want to talk to initially is three care

five care 10 or 20 kit front now, it's zero dollars down just a few hundred dollars a month, which makes this process so better and so easy to do.

So some quick money math, you guys can like ground this from reality of what's actually possible next few days. Let's just save the past three months. For example, you had 20 prospects who could in afford it. We said no because it was price three months, right? Yeah, you know seven a month you did that with Max Plus using text. You'll get 70% in the back of the phone, which means you have 14 refuse calls now you should be because at least 50% of reclude calls. No when I was doing this we overclose, you know, six out of seven calls very high, you know, 80% plus rate close to 90 sometimes because the process is so good. Even if you only close 50% even 40% right that means seven re-close deals and say you're selling 10ks 70,000 in up front cash collected and even if somebody's numbers are only half as good as that for you right that can be 35,000 cash collected if you're closing 25% and 10K or 50% of 5K. It's very easy. You can see to attract a lot of capital your pipeline using the strategy and so actually share with you.

Case study of how you know, I did this how we did this with one of our previous companies. So on when a previous company, we were selling as a business opportunity company like a coaching company in that realm and you're going through and There's one week. So I was a Setter in this company. I've been setting probably a month and a half. We started coaching program about real estate and we're going through and

there's this week right before Christmas. I remember on Christmas break there's this week long period to where we went on and just I started recosing a ton of deals. What happened is that there is I've been learning setting for a while. I've been going through training but not I never really done close calls and like one or two just like, you know pass a few years doing random stuff, but I read then no actual close calls and really not a lot of like Coast Guard training. I just been focusing on setting setting that go through the training you guys are really going through here today the same principles and there's one night. We stayed up really late went through did a lot of sales training and then next morning came in as a Saturday morning. We're getting sets and I just won't call the lady.

I called her because I saw it in the CRM that Jake Paul the closer about a month ago a month and a half ago, but it was only 30 minutes long, and it looks like she got disconnected then the call so I called. All right, this is set. Let's go call her up. And hey, you know, let's get a call with one of our closers. I saw you got disconnected. So I want you

back in the calendar. I hope you finish the call. And expecting your easy set to go through she says well actually no like I I actually did finish the call as like, okay, this is about to get interesting and so they will tell me about that how to go. So yeah as you talk about the program and all this sort of stuff, but you know, it's just too much for me as can afford it now as

all right. So in that moment, I was thinking I can just get it I can just get it back in the calendar. You know, I just get back counter easy set. But there is something inside of me like not you know, I I should go through and just like see if I can close this one. I never closed before and so I said let me ask you this. Like, you know, you talk about

the program like, you know, how certainly the B&B is like a good program for a good fit for you. All right this question program. He said I 10 and when I heard that alright, it's on let's go, you know and I was one of the the close call framework, which literally you're gonna go through here in this this training. I went through the close call framework and just started voting Gap with her creating down her vehicle expanding her

vision boating, you know, desire pain Etc, you know the point where I brought it back to the pitch and I pitched her she gave me objections, you know complaints Etc.

I held resolve frame held frame handle them and then boom I closed your had to go through funding and this was a deal that was supposedly not closable by you know closer who's on our team is really good wasn't closable and I was able to go through literally never have closing deals before never been an actual closer on calls go through a week close because this process they're laying out here. It's incredible went through a real closer. And

I thought you know, this is this isn't too hard. I can do this more and so I went through basically found all the deals that had basic on coldness people who said no people said they couldn't afford it people who said yeah, I'm gonna go through funding but you know back back then.

Back in the day our funny process that we had like six week long, you know Midas didn't exist back then it was really painful really hard to go through you to talk with like people from different companies. It was like, there's like all like chaotic and hectic and they do go through and they they'd say yes to me with to find him then they'd false process and you know, never hit us back. So it's fine all the leads who were like old cold dead leads old leads. Basically, there's nothing happening on them. It went through I started calling them as our calling them all and going through re-closing them. And in the matter of seven days actually closing 41,000 in deals and breaking the cash flows record that we had at the time for closers. I wish you know tells you is a different landscape back then as well, but literally setting having no actual

fresh calls and calendar. I went back through and close 41,000 in deals because of this process and so actually, you know, kind of walk through how you can replicate those results how you can emulate a lot of those and your pipeline and depending on how big pipeline is, you know, and how much time you spend on this you can maybe it's even if it's one deal or two deals. I can be five or 10,000 upwards of you know, five 10 20 deals and

you can rap obviously quite a bit more. So the step by step game plan for doing this how you can go through do this. First thing you go through is obviously watching the videos here this video right now and going through below watching the videos for how to get prospects on the phone using texts They See Me video here how to use max to actually mass text prospects. So you don't do this stuff manually all done for you how to go through and get prostate on the phone leveraging MAX or use two strategies. Remember to get them on the phone. Number one texting them number two calling them. Then once you find how the phone how to actually re close somebody so we want to do is go through watch these videos go through the re-closing process study that Master that listen to the call recordings down here and we have here two example close call or re-close call recordings.

So what you want to do is go through study this watch the video here practice the script listen to call recordings. Then you know where you want to do is go through and send out the text to the prospects. It's basically here go through the read closing training listen to call recordings and then use a copy-paste templates to send out the text to the prospects because again through this process as a Setter. I think we go through and we close 41,000 matter of seven days are on the holidays time too, which is to the Harsh Times of clothes because people they want to have money for Christmas gifts. I want to save up they have all these excuse bugging to start off the holiday season. And in that time I was able to close 41,000 as a Setter who had never closed before because the process is so good. If you're a business owner right now you're coming into air you have the ability to go. Pipeline and literally rack five figures six figures plus of cash collected from this deals that are easy to close because in these deals, you know for us, Our funny process back then was six weeks long, you know two to six weeks long. It's the deals I closed how to go through a two to six week long funny process to actually get funded in pif and they

stuck through that process because they were closed right but now with Midas you have the ability to have a deal go through zero dollars down and get funded literally with no matter if you know 24 to 72 hours and get funded and have the cash in your account, which is incredible. And so all these people are gonna talk to you remember these four groups right here, you have pay plans these people right? Here are the easiest people

to close because they already gave you money. They already they want to do your service and probably paying you, you know, two 300 500 thousand dollars a month for your service. And now you could go back to them and say hey you're paying \$1,000 a month right now. We're testing out new right get you in and drop them as a payment to \$200 a month. Do you want to do that?

The heck. Yeah, I want to do that say in ours a month you get them funded and now you get 10K up front 5K up front and they get it lower with payment which they're pumped about you're pumped about is you got a pif and imagine even if you have three four paper that paypals right now, maybe five you can go through and instant collect 20 30 50,000 dollars off those deals instantly. It

was the easiest deals to collect on then you're gonna go through and again kind of come back this framework, right you're sending out text everything person, um your conversation person, you're gonna go through text all the people who said no because the price or wanted to the program but couldn't afford it right these people who are amazing as well. Maybe you talk to people who are they're fired up, right? They wanted the program. They excited in terms

of their disqualified. They only had two healing when your programs 10K and it sucks because like they got so far but a great Gap with them. It feels almost all forward like not them in the program.

And now you'd go back to every single one of those people and imagine even if you only have no two people a week who said no to you because they couldn't afford it or the past month. They'll be eight

people past three months to be 24 people go through 24 people who couldn't afford it and I get to talk about them wanting to the program give a zero dollars down two dollars a month hundred dollars a month. Imagine. How do those people are gonna say? Yes are they really wanted to do it? They couldn't afford it. If all they could do is afford it to get your program. Now you get another five ten twenty of those people into your program and pip them up front you get them in for just a few dollars a month. Then finally those people who are on the fence those prospects who yeah, they want to do it where they're been uncertainly one more information. They want to think about it. They won't holding you whatever it is, but they haven't lost the weight. They haven't made the money on the make or the relationship is still in shambles

and they haven't changed. It's been a month or two months or three months now, it's like we're darn like I can't do this on my own. I need some sort of help now, they're looking right. They're on the hunt looking for help again. And now you get a call them text them at their exact right time. They want help.

And because of that you get the ability to come through push them to Midas and then pip them in the spot. So kind of a side tangent there, but as you're going through this you're gonna go through videos go through the recosing training send out the text all your pay plans first. These are the easiest lowest hanging fruit text them all called them all. You're probably already coaching them every single day to either the easiest people to talk to Easy people

getting contact to and easy people close as well. Then once you've done that you don't do work that the lowest eating fruit pit all those people you're gonna use max a mass text you every single person who got on a call with you but did not buy the past six months every single person whether they said if you don't want to talk to you or this that they couldn't afford it or I said no, they're on certain whatever was every single person who didn't close we're gonna send a text out too. And here's why because people oftentimes over time will change their their beliefs and their sentiments right in terms of like if someone said no, they didn't want to do it. Right it wasn't the right time for them.

Guess what three months later. It could be the right time for them. You know, they they finished the move or their kids out of school or you know, now they got a new job whatever it is, right? So they say it wasn't a good time with them. Well guess what life life happens?

Changes now it could be good time for them. Or somebody couldn't afford it, you know again obviously now they can't afford it with Midas or they said no because it's too expensive, but guess what they got to raise it work two months ago. Now they have more Capital coming in now they want it for you and also they see their friend the brother actually started this this opportunity you're selling and he's making 5K months

and I was like, holy smokes I gotta get into this. How do I get into this? Guess who calls? Right, so there's always opportunities to capture from people who life happens such changes for them. Now. They're ready to buy now you get to tap into every single with an insane enticing offer getting back in the phone.

And so what we're gonna do. Is leverage these text templates down here which video how to go through? So these up I'll explain the text like the templates and psychology Jazz.

Oh, so what you do is you go through leverage the texting to get them on the film. You hear the hottest leads on the phone first, right? So you text them out within an hour. Yeah. Someone's like I'm interested. I want to get on the phone with you. Okay? Awesome call that person right away get them on the phone.

He's the hottest leads low scene for in this section. We're going for the lowest hanging fruit first, right? Because there's a lot of cash in the table. It's gonna go through get the paypoints first then people who respond to your text. Then once you've worked through all those you gotten like the lowest fruit a lot of cash in the account, then you can go through it's her working them with Max you start pounding the pipeline. This is where I got personally my deals from when I was doing this really closing. We hadn't, you know come with a lot of the texting sequences

yet and testing yet. We did over the next few months. But initially I just calling people just hit him up, you know down the pipeline and have Maxi house is using like some old crms like may know what time people

and getting through to them and it's pounding the pipeline and getting them on the phone. I can imagine if I had Max back then there would have been a lot more money made in that.

On but regardless I was able to get people on the phone just by pounding their phones and then go through recode calls with them. Those are some of the phone calls you'll ever do and so once you go through there, you pound your pipeline from one two, three days. What you're gonna do is 24 hours after sending your first text to prospect of like hey, you know, are you interested in this year dollars down in the program Etc 24 hours

after that. We're gonna send a follow-up text everybody who didn't reply to your first one. So all the people who you texted and then never shot you text back now you text them again and follow up with them. Now, you're gonna get a few more people to respond you then you hop on the phone. We close all those leads and then 24 hours later. You're gonna send another text get a few more people to respond and we close all those leaves.

She over the course of about three to five days you dream to go through work your entire pipeline did a ton of low-hanging fruit easy deals and get a lot of cash in the account very very quickly and you can work this play, you know for two weeks straight and then also you can do this on repeat basis, right?

This is not it's a one-time thing, you know, two three months from now again, we've gone through Pipeline and some people said no to you and you know, people said yes to you you go through this exact same play and just extract cash even on every single quarter go through send the text out get the low hanging fruit get them back in the program pick them. Boom. You extract cash every single quarter doing this. So that being said I know adapt a lot on you here. What you want to do. Next immediate steps is I want you to go through the re-close training before you even go through the text because I want you to be fully prepared that's you recall somebody before you get them back on the phone. So go through the recos training your full contacts had to be close somebody you'll see the dock here.

This video in here as well recosing process. We'll go over the framework. There's car coordinates in here all that jazz. So go through the recosing process go through the script go through the video. Once you've done that at that point go through and listen to these two call recordings. So watch this video here first. I kind of break down the call recordings. If you contacts then listen to the two call recordings after that take to notice in them.

Listen to a few times over you really get that deep context on it. And once you've done that at that point, you're ready to be close. And so what you're gonna do you're gonna go ahead and you know go through the videos on how to use max to message prospects. Go ahead and put these copy and paste templates in here. We have all the templates for you. These are very easy to use copy and paste them right into max. Send

them out and a lot actually for probably quite a few you guys already have free done templates and there for you. So use max Excuse me, the mass texture prospects get them on the phone go through recluse them right just like we laid out and so what you do is that after you've gone through again go through the reclosing training process go through the call recordings after you've done that you're gonna go through and watch the video. On how to give you a back on the phone using texts via Max once you've executed all that you've sent all the texts. They're all firing. Awesome. You'll be working those leads. And then while you're getting those text back then you'll leverage Max to outbound down that lists the same time. So what it'll look like Lydia Day in the Life is you you log in here go through the training you're ready to rock and roll you've gone through recosing training you're gonna log into Max and follow the videos, you know in here and how to use max I should give them set up your follow videos, you're gonna send the text, you know, 50 people 100 people.

However, many it is then they're gonna text you back people text you back and call them right away get them on the phone. And then why waiting for text you back as well use max out on the list and get these Hot Prospects on the phone with you. We close them and send them to find him. So that being said next steps of all is go ahead follow the framework step by

step you do this. You'll get a ton of deals from your pipeline follow the framework, like literally in order here everything you have everything you need here to just absolutely rack off your pipeline and change obviously.

Is right here in this Google doc all the links all the videos Etc. So that being said go out there extraction cash with Pipeline and most importantly change people's lives because that's what they need. That's what you're here to do. And if you truly believe what you're selling then it's your more obligation to help these people and get the point where you deep down internally believe and feeling these calls they need this you can do that. Then you will crush change a ton of lives and make a ton of money in the process.

Bonus: How To Re-Close Someone Once You're On The Phone

Alright guys. So this video I'm gonna walk you through the air re-closing process. So this is what to do when you get someone on the phone whether through Max through the texting whatever it is on the phone and you're ready to re-close them.

This is the process gonna follow the process that I followed possibly followed many times before to get someone to be ready to rock and roll get fired up to join your program change your life and if with you via Midas, so overall when we walk through the framework and then we'll dive into the actual script itself.

Now there's been pretty similar to our actual close call script on just a slightly different opening and transition into the Gap that we

do on normal close calls. So overall framework for the reclosing process important thing to understand is from a psychological perspective like where this Prospect is mentally right before we even dive into close.

Somebody know where the prospect is because you know if the simulate it through like What's the prospect's mind? Like what are they going through what's going through the head now you talk to them in for me. Maybe it's a week ago a month ago six months ago 12 months

ago, right you talk to them because they were the point zero zero one percent of people who clicked on the ad who opted in who actually picked up the phone who actually set and actually showed up and talked to you went through entire close call, right? It's a very small potential people. These are high intent leads. They talk to you from some reason in close. A lot of these guys will be because they don't

have they can afford it. They couldn't do because the finances and these easiest best people to re-close using this process. You can also use this to close people who really said no or who went cold or ghosted you, you know, after you talk to them you're gonna follow up with them. They just never talk to you again. This would be used for really any type of prospect who didn't close with you.

And so it's important this Prospect. What's the close calls you so they're familiar with the offer most of them at this point. Right? No, but you're selling to know what you're about.

And at this point now is your job to go back through and re-close them. Now you all spend the Gap with someone like this before already. So you should have context and kind of remember overall. These have notes on who this person was and kind of what their Gap was even if you don't you're gonna be able to get all the context again here in this call.

And so this person right here. They're in Prime position to buy they've had months, you know anywhere from weeks to months since last time I spoke to you which means if that time to realize that they can't do it on their own.

Because a lot of times people say they can't afford it don't help whatever it is. They can do on their own now you get to talk to them a week later a month later three months later and dig into the fact that they

have not changed it and they can only change with help with your help. That's really one the important keys that we're gonna be anchoring here is that they need your help to change. That's what we want them. We want them to realize that and so it's important for us to First realize that they need our help to change because if they didn't they would have changed already. They would have gone the result. They wanted to they would have lost the weight fix the relationship made the money they want to made but they haven't yet because They haven't changed anything about the lifestyle the routines

their actions their beliefs their habits because of that. They haven't gotten any different results, right which is you know, the way way things work. So now it's our job to come back through get them the phone re-close them and get them to actually make a change actually make you know, the decision to change your life. So Overall framework for how we're gonna do this. It's very similar to the close call almost actually almost

identical this the frame the call is a little bit different since it's not a scheduled, you know, hop in the call. These are first time talking to them. You've talked to them already going through this process most likely and again this actually works even if you haven't talked to them already, I've had calls like that where you'll listen to an actual call recordings. One of the calls why I hadn't ever talked to before but the closure had now I've had back through your closer. So the open up you'll open up with intro kind of going through like getting Connick and where they've been since last time you spoke to them you dig into the pain of them not changing CIS. Let me spoke to them then not having made any changes. Then you go through and build the Gap get into the pain get into desire then now you go through and you pitch some funding we close them and then take them funding and change your life. So key Point here. Is that the reason they're gonna buy On this call with you obviously comes back to the Gap right specifically is that you make them feel that they have not changed you.

This is the last time you spoke which is the truth, right and that with your help, they'll change if they believe that you get them in that motional pocket that buy in Pocket via the Gap then they have to buy if they're truly committed to making a change the actual make a change. They know they can't do it on their own. They're in a gap. They have an internal pressure then they have to buy they know their choice but to buy Because the actual make a change, right if they don't if it make a change, they wouldn't be on the call with you. Now, they would have hung up in a long time ago and they would never happen to call with you in the first place. Right? Because nobody nobody option goes to a call goes through a set call goes through close call because there's interesting information Nobody Does that right? Anybody's interested in information or gets on

a call because there's some sort of reason why people are busy right people families. They have jobs. Nobody wants to carve out an hour or two hours of the day. I'm for something they don't care about right. So just know that they're on the call with you at this point they care about this a lot and they're ready to make a change so I don't know when pitching funding these are some price points like in terms of whatever your program cost when you're pitching them. So if your programs 3K monthly payments, we've got 80 200 dollars. It's 5K about 140 to \$200 if it's 10K 200 to 80 and then 20 K is about 500 to 600 and this is all just depending on what credit score they have. And also what length of loan this select as well, so I don't know when you're pitch in funding to know that.

So overall, here's the process. I'm kind of like run through how you go about doing this and then you actually have two call recordings. Listen to from my calls. I did which I told you about how I went through we close 41k all Jazz actually two calls from that week. I did that. So you get to hear like real live calls of real live recosing calls literally following this framework in this process, so

Basically overall and again, this is a general framework. And so depending on the prospect you might go different directions, but overall the principles are there if you're gonna open up dive into the Gap create the Gap pitch funding close, right?

That's that's overall framework. And so what you'll be doing is you kind of open up and it's something like this, you know ring. Hey. Hello. Hey John, it's Thomas from Air.

How you been? And the independent how recently talked them. They might be. Oh, I'm doing good. You know I did or like you know who like wait where you from again? Yes Thomas from here. We spoke about a month and a half ago two months ago, but getting you some help with you know, your your to our business or do you have this with weight loss Journey? Oh, yeah.

That's right. Yeah, how are you doing? Yeah. I'm doing awesome man. It's over here, you know trying to change the world, but John I was just wanted to shoot you a quick call here because I was just sitting here thinking about you and her last time we spoke you you were saying that you're really struggling getting that first that first turo car on, you know on the marketplace and that was a big problem PS. I just wanted to check in with

you and see how that's going for you. And then they'll open up and you know, nine times out of 10. They want to made any progress. You know, I you know what, you know, man life's been busy. You know, I yeah, it's yeah stuff's happen and working job. I haven't met a lot of progress in that. Oh really? Why is that and you this is where you can start diving into

the Gap with them right? It's so now you get to open up. They're gonna tell you they haven't changed or they've made some progress not where they want to be. They're gonna tell you that and share that with you and now you start digging into that a bit. You know, what are you tried in the past? You know two months to try to fix that we tried. Well, why do you think they didn't work for you?

You know what live you guys start with it or say that maybe they haven't got started with it yet. You know, why even got started with it Johnny. I know you you're really fired up last time you spoke.

Or you know, what do you think this has been holding you back from from figuring that on your own and I know you're really excited about this last time we talked. And they'll give you some you know, some some fluff some reasons excuses Etc. Right just reasons why they have me able to do it their own and then really what you want to do here is just like we talked about the close call in the set of call process is your, you know, basically a A metal detector, right you're on the beach. You're you have a metal detector and you're looking for that gold. Right and a lot of times you should know what

this person's Gap is because you already talk to them, but even so it's going based on what the cadets in the call. You want to get back into the Gap with them and this basically turns into a close call with a prospect who's already been like, you know shown their High intent that's basically what this turns into and so you dive in you're dive into the actual Gap with them, right which you know

leveraging the the closing call Process you've been through so at this point you should have already gone through the clothes training before you get to this section. You haven't definitely go through that first. I'll give you all the principles you need to go here because really this is just a close call with a different opening and different frame in a slightly easier pitch because they've never been pitched like they said no because it can afford it a lot of times whether I'm plans whatever it is and now you get to get them at zero down but this again this is basically a close call going through with them. And so that's what the process and the friend we're gonna follow. So again getting the Gap them start digging into the pain again, you know, John I see my notes Here. I remember last time we spoke. It looks like you had to go 50k muscle. Okay, awesome. Tell me about that man. Like you know, why you still fired up with that goal. Like why you still working towards that? And then boom get back in the Gap with them start building the pain putting the desire.

And once you've gotten the point where you know, they're in buying pocket which you know talk about the closing process right once they're they're ready. You've gone through the Gap and you both the Gap.

They have internal pressure you feel that they're again now this is where it gets really fun.

Because the last time you pitched them it was either, you know, 3K 5K 10K 20K up front and they couldn't afford it or they said no or whatever. It was. Now this time you get to tell them about something really special you're doing for them.

And so when you're pitching the call, you're pitching the program they already know about the offer. It's good to remind them right recap the offer again because it's been a while since talk to them most likely

and now you get tell them that you know what John Paul something really special for you got this new thing. We're testing out in that. I'm actually in the program for your dollars down the entire thing and just be exposing per month 200 dollars 80 months. Now if you want to bucks a month, whatever it is. And now you see that process again. For the sexual script the reason why we haven't like read everything out here is because you'll literally fall in the closed script process that you you've already went through just the intro is slightly different but you go through the process and now they get to get in this program that previously they couldn't afford to those 10,000 or 5,000 or \$3,000 up front now they can get in just for a few dollars a month. They're gonna be so fired up that you call them talk to them. so that's overall the process. This is more of a high-level process because again, the close call script is going to dive really deep into it. I actually close somebody and then also we have two call recordings you to listen to as well from real real we close calls that I did and if I don't a funnel thing to note when you're going through these really close calls is that one of those powerful parts of the re-close that you'll be able to do is holding resolve frame and so once you build a good Gap, it's just having this undying belief that this is the best thing for your prospect. And again, I know you probably heard this probably five times at this point already, but you know, what gets repeater gets remembered. This is something that when I was closing, I cannot remember a single close call to where if I truly felt internally. I had the internal conviction of like, okay. I need to close this person. They need this. There is not a single closed client close where I felt that deeply and a single one because when you truly feel and you believe someone needs this is usually a clear path why they need this clear reason why and it also they feel your conviction and you're able to lead them the same conclusion because if you believe it it's easy for them to feel that they believe it right because human beings are they're not they're not dumb right? They're smart people and we as humans have had, you know, probably millions of interactions million plus interactions with humans throughout our life a hundred thousands millions of interactions. So we've done pretty good at telling when someone's fluff and versus when someone's real about something right? So if you truly believe what you have is what this person needs you see the path them why it makes sense for them to do this and how they literally be stupid not to do this. And you'll close them every time and then it's also your obligation to hold them to hold that frame. Hold them in that that zone of like internal pressure. To make the decision, right? And again, you've already heard this but just reiterating this like kind of go back to this point. When you're re-closing somebody the goal is not to externally pressure them into anything. All you do is that you create this Massive Internal pressure. They're in the clothes you've presented the offer and now that's where the fear comes up. That's where the surgeon comes up. Sometimes. They'll be redirecting right away. But if this fear that pops up right I can't do this exercise. There's not the right time but it is right and most the time you do it right? You shouldn't get this objections but occasion you will And in those times, this is not where you pressure somebody doing. This is where all you do is you take that excuse away. And then you you leave them sitting in that internal pressure that Gap again. Right, they say they can't afford. Oh, no problem. John's only two dollars a month. And like ah crap, I don't have that excuse anymore to not buy. Uh, well, I can't do sweaty take this use away. So all you're doing is like it's almost like and if you guys ever like seen like, you know, karate kid, right and he's like teaching karate, you know, you know Mr. Miyagi Daniel son. Did you karate right? There's different styles of martial arts, right? There's like the boxing we're really going, you know, if you've ever seen Mike Tyson fight where he punches get knocked out cold like they're done they're out and they're just like aggressively going on each other versus there's another style of martial arts called Tai Chi and Tai Chi is where you use opponent's energy against them, right? So if someone pushes into you, right, so I'm pushing your shoulder instead of pushing back and trying to like wrestling down you pull them right and now the fall of Bounce or if you know someone tries

to pull you instead of you're trying to like resist it, right and then having control you then at that point you can lean into them and use the energy against them.

And so it's important to stand when you're going through and you're you're going through the closed car that you're actually playing Tai Chi with them not trying to box them. You're doing Tai Chi and so they throw an objection at you in this reclosing process. The goal is not a combat it's just to take it away and then leave them in that Gap again where they're forced basically because they have that internal pressure. They're forced

to make a decision for themselves not because you pressure them into it because they pressure themselves into it by having this vision and feeling like they can't get there on their own and then when you do this, right, you're the leader right you like this wall to where his own excuse at you and it bounces off bounces off.

You're not fighting it just kind of Falls away. And then at the end of the day they have to make decisions change your life. So that's as an important note. You probably already heard this a few times in the close call process, but just reiterating here in the recluse a lot of these people they're gonna have excuses gonna have fears and objections. That's where you're like, that's where you get paid as a closer as a business owner because you're able to lead them through that uncomfortable decision-making process into the other side where the action rate the decision they didn't make to move forward and install the problem they have so that being said that's overall the re-closing script and framework and that point obviously taking to funding follow the funding sap just like normal as you as you would any other deal and then

congratulate them on changing your life get them onboarded and whatnot and then go through and repeat the process for the five 10 1500 other prospects. You haven't Pipeline and change lives and then, you know, extract a ton of capital of the pipeline over the next few weeks.