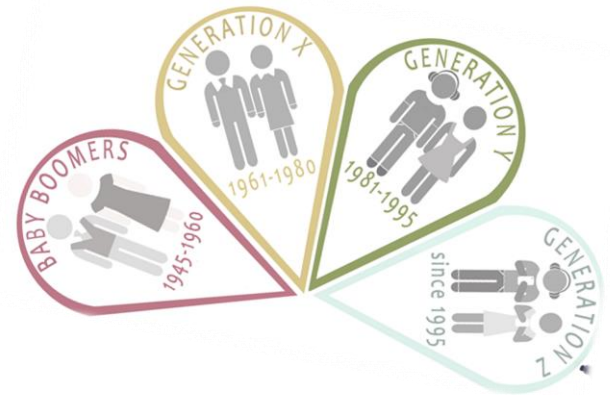


QUICK REFERENCE GUIDE

Understanding generational differences is a critical of effective communication and establishing trust when providing recommendations to a client.



Baby Boomers

Make It Personal	Exhibit Professionalism	See the big Picture	Desire a Team
Want to develop personal relationships in their professional lives. Prefer emails, in-person visits and phone calls.	Appreciate experience, brands, accreditations, credible company reputations, etc.	Like to have a long-term plan. Offer customization to fit their exact needs.	Like contributing to a team effort.

Generation X

Initiate Research	Take Control	Evaluate Viability	Remain Connected
Make decisions based on facts, data, reviews	Prefer to be in the driver’s seat in making decisions – don’t hold anything back. Provide all options up-front.	Very practical and prefer quick results. Explain how your product can improve their lives immediately and later.	Buy online and prefer email and text

Millennials

Go high tech-Be all digital	Desire instant gratification	See membership	Be upfront
Access everything online. Love social media and text!	Everything needs to be quick and easy. Offer instant access – eApp/Drop Ticket	Gravitate towards groups while striving for independence	Value honesty and have a low tolerance for inauthenticity. Just be yourself to win them as a client and a referral

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