

THE PINGER SYSTEM

**How To Build Your Professional Network,
Grow Your Influence & Become An
Industry Thought Leader**



S. Jay Coulter, CFP[®], CIMA[®]

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For the past several years, I have been teaching my *Connect and Influence* workshop via live events and webinars. These events are designed to be simple yet comprehensive, and, most importantly, actionable from day one. In these workshops, I teach participants how to build and engage with their networks, grow their professional influence and generate leads.

In the late nineties, I read a book on networking called *Never Eat Alone* by Keith Ferrazzi. To this day, it is still the best book I have read on business networking. In it, the author outlines the system he used to build his professional network and catapult his career. As someone who loves systems, I fell in love with it instantly. Over the years, I

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developed my own style and systems for staying connected with my network. These practices have evolved over time and I still continue to refine them today.

The core system I teach is called **The Pinger System**. It is the same system and strategy that I used to build my nonprofit into a brand with a global reach and over 200,000 followers on social media, and my personal reach to over 50,000 professionals. It enabled me to connect with volunteers and advocates all over the world. I have sold my books on five different continents and my podcast has been downloaded in over 100 countries. I would not have been able to accomplish any of this without the system I'll discuss here.

Social Selling is a Myth

In general, financial advisors are very skeptical professionals. This is quite understandable, given the nature of the profession and the wild roller coaster ride our careers have been the past several decades! Our skepticism, however, makes it incredibly difficult to move the needle when it comes to advisor participation and engagement with social media. I am reluctant to mention social media active monthly user statistics in a hard copy book because they change so rapidly. But, in general terms as of 2018, here are the numbers:

- Facebook: 2+ Billion
- Instagram: 1+ Billion
- LinkedIn: 550+ Million
- Twitter: 330+ Million

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Consider this staggering fact: 76% of all Americans have a Facebook account. That means you can assume 76% of your clients and prospects are on the platform. What do they see when they come across your profile? How about LinkedIn? Instagram? These are massive platforms that provide access and opportunity for financial advisors who want to connect with more people and establish themselves as a thought leader in their market.

In my experience, this is where the problem for most advisors starts. There is a great opportunity here, yet most do not understand the application. This disconnect has facilitated the creation of nonsensical marketing scams and companies that promise untold riches if you just leverage their social media marketing program. Their marketing is slick and their promises are large, but I have yet to find one marketing program that delivers real results

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that are worth the price for financial advisors.
Social selling is a myth, do not be fooled!

You are in the relationship business, not the mass marketing business. The opportunity with social media (and, in fact, in all digital media) lies in building your brand and influence using these platforms. This is a process that takes a long period of time and real work to make authentic connections. *This is a once-in-a-career opportunity to establish yourself as a thought leader in your market, but it is work and takes time.*

Why Most Advisors Don't Use Digital Media: The Common Objections

Seasoned professionals in any industry are always slow to adopt new technologies and opportunities. I remember, as a young stockbroker in the mid-1990s, there were a significant number of older advisors who refused to use email! Let's not even get started on having a website at the turn of the century. Eventually, these professionals had to adapt to the technology despite their reservations. Today, most financial advisors who are not active on social media give me one of these six excuses:

1. *“Compliance is too restrictive.”*
2. *“My type of prospect does not use social media.”*
3. *“I don't have the time.”*

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4. *“Big corporations like Proctor & Gamble are pulling out of social media marketing. Why would I waste my time?”*
5. *“I don't know what to say.”*
6. *“I'll just pay someone to do it for me.”*

On the surface, these excuses serve as enough reason for a financial advisor to not try to leverage social media in their marketing efforts. Let's face it, it sounds like work! However, this kind of short-term thinking will leave an advisor well behind his or her competition over time. Successful financial advisors utilize every method possible to be “known, liked and trusted.”

For argument's sake, let me address these objections:

1. **“Compliance is too restrictive.”**

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There are no known compliance rules prohibiting you from having a personal Facebook account. If you choose not to have an active presence on the platform, it is your choice, not your firm's decision. Now, to be clear, just like in the non-digital world, a financial advisor needs to be judicious with their comments and presence on the platform. I recognize that a significant number of compliance departments limit functionality on LinkedIn, but that has loosened up significantly lately. As you will learn from my system, it is not what you post but who you connect with on a regular basis that drives results.

2. “My type of prospect does not use social media.”

This statement is just an easy excuse as you know the statics on social media adoption. I hope you now know this is just not true. There will be valuable prospects that do not have an account on one particular social media platform or another. Yet this does not mean all of your prospects do not use those sites.

One of my favorite consulting exercises is when a client tells me that their clients are not on Facebook, I ask them to walk through their top 10 clients and we look to see if we can find these individuals on the site. Usually more than half have an active profile. Don't fool yourself, they are there!

3. “I don't have the time.”

Before anybody starts building a digital marketing system, a simple question must be answered. Are you interested in investing the time to grow your business? If the answer is no, then please don't waste your time learning these different systems. It will just lead to frustration. But if you are serious about growing your business and live in the digital world we all find ourselves in today, you must make the time to build a digital footprint. This is a necessity if you want to remain relevant in our industry.

4. “Big corporations like Proctor & Gamble are pulling out of social

media marketing. Why would I waste my time?”

People do business with people, not corporations. Who would want to follow P&G and see all of their advertisements about toothpaste and bleach? You are in the “people to people” business. People want to see what's going on in other people's lives. That is why reality television was and is so popular. It can be almost addictive to some folks. In fact, your rule of thumb regarding a particular marketing channel should be: The more corporations advertising in a particular space, the faster you should run the other way!

5. “I don't know what to say.”

I understand this sentiment can be a difficult thing to get past at first, especially if you were

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raised to be humble. If you think people do not care about what you had for breakfast, you are correct. They do, however, care about what is actually going on in your life. The best guidance I have heard on this topic is to “document what you are doing.” Try not to brag; nobody cares about your flamboyant vacation. However, they *do* care and would be interested in learning about a charity you care about. They do care about what's going on with your family.

During countless consulting meetings, I've had high functioning financial advisors tell me they would have nothing to say on social media while they spend most of our time together talking about everything that is going on in their lives. Everybody has something to say.

6. “I’ll just pay someone to do it for me.”

I cannot tell you how many times I've heard this one: A financial advisor outsources their social media to an intern or a third-party agency. As the late Jim Rohn used to say, “You can't pay someone to do your push-ups for you!” Connecting with people cannot be outsourced. There are components to your digital footprint that can be automated and outsourced, but those systems will never, ever result in you building a relationship.

The KLT Principle

The KLT Principle has been around since the beginning of the sales profession. People do business with people they “know, like and trust.” Consider this concept throughout history. The door-to-door salesman who canvassed his community selling household goods at the beginning of the last century would have starved if not for building a reputation as someone who was known, liked and trusted. With the invention of print marketing and catalog sales in the 1920s and 30s, the door-to-door salesman became obsolete as print marketers built brands that were known, liked, and trusted.

Then came radio. The radio advertisements could reach you anywhere there was a transistor. The message was never stale, and the repeatable nature of marketing message

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made the brands using radio known, liked and trusted. Next, television slowly made its way into the forefront of sales and marketing. Slowly, over the course of decades, television brought you brands that became household names due to the fact that they were known, liked and trusted. TV marketing was the main benefactor of the KLT principle until the internet and email marketing started taking over. Its run as the predominant mechanism to achieving KLT status was short lived. Before anybody knew it, social media took over. If you doubt the power of social media and digital marketing, ask yourself these questions:

- *When was the last time you watched a television ad?*

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- *When was the last time you looked at a billboard on the side of the road?
(Chances are you had your face buried in your phone if you were not driving).*
- *When was the last time you clicked on a banner ad?*
- *When was the last time you opened junk mail that came out of your mailbox?*
- *When was the last time your SPAM filter did not catch an advertisement?*

**The game of attention has changed.
Forever.**

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Attention is on social media today. There, you will find birth and engagement announcements, along with other major life milestones of your clients and prospects. You can learn so much about your clients and prospects on social media that you're putting yourself at a disadvantage to your competition if you are not paying attention. And please trust me, your competition is there actively building their digital brand. If you want to be “known, liked and trusted,” social media is where you will find the attention of your clients and prospects.

But it takes a system.

The Science of Influence

In his book *Influence: The Psychology of Persuasion*, Dr. Robert Cialdini provided the results of his research conducted over multiple decades on the topic of influence. Influence is just another term for sales and marketing. To this day, I believe this is one of the best books written on the topic.

Dr. Cialdini presents six “triggers” which drive influence. His research was conducted before the creation of social media, but four of the triggers have direct application to professionals who are trying to grow their professional network and influence.

These are detailed below:

Reciprocation: In basic terms, this is the law of give and take. We are

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hardwired as humans to feel the need to return a favor. When someone shares, likes or comments on one of your posts, it's human nature to feel the need to return the favor.

Liking: As simple as this trigger may seem, it cannot be discounted. We are drawn to and want to spend time with people we like. Our engagement and receptiveness to marketing messages goes up when we are communicating with someone we like. Social media is a great platform to help enhance this trigger.

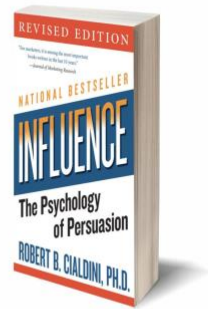
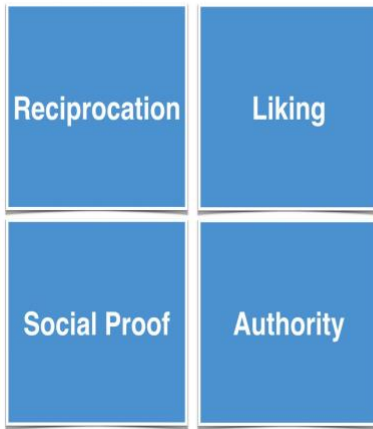
Social Proof: Unfortunately, we are hardwired to be influenced by the opinions of others. That is why terms such as “bestselling” and “number 1 rated” are so common in marketing

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copy. This same concept has applications that result in triggers for professionals who are actively growing their network and influence on social media.

Authority: Humans are genetically disposed to trust people in positions of authority, unless that authority is abused. As you learn in my training program, it is simple to incubate an authoritative tone on social media that can have a long-term impact on your digital brand.

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“Losers have goals...winners have systems.”

~Scott Adams

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Building your professional network, brand, and influence in the digital age does not happen by accident. It takes a plan, a system, and *time*. If you are looking for a quick and easy solution to building your digital footprint, it is not going to be found here or anywhere else. If it was easy, everyone would do it and there would not be any value in it. What I am about to teach you is simple by design. But it is not easy. And you will never get results by paying someone to do this for you.

There are three modules to the *Connect & Influence* program. First, I'm going to teach you how to build a custom Pinger System that will enable you to stay connected with your

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network and manage your key relationships. Next, I will show you how to jumpstart your Pinger System with the Digital Supernova exercise. Last, I will show you how to build influence and cultivate leads by leveraging the BEEP Method.

It is very important that you do not skip ahead to the section on lead generation. If you do not have a Pinger System built to capture and manage your new connections and potential leads, you will just be wasting your time.

Building Your Pinger System

Your Pinger System is the backbone of your person to person (P2P) relationship marketing. It is designed to help you prevent those important, hard-fought connections

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from falling through the cracks. I am sure this scenario sounds familiar to you: You are at a social or business event and connect with someone who could be a good prospect or COI now or in the future. You swap cards and connect on LinkedIn. Then what happens? Nothing, typically!

The Pinger System helps solve that problem. Conceptually, it lets you know when it is time to “ping” someone you deem important to your networking or business efforts. It is designed to keep you “top of mind” in your network.

The 5 Components of a Pinger System

Building your system requires careful thought and consideration on the front end and will

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pay huge dividends once implemented. The devil is in the details.

There are five components to building your system:

1. Who
2. What
3. How
4. When
5. Where

- 1. Who: Deciding who your most valuable connections are...and will be in the future!**

When deciding who should be added to your Pinger System, I recommend a simple two-step binary approach.

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Step one: Is this person someone I want to stay connected with because of the value they bring to my networking efforts? Obviously, this is a yes or no question.

Step two: If I'm going to add them to my system, do I want to stay in touch with this individual on a regular basis because they are of high value, or would I prefer to just have an infrequent scheduled connection?

Let's apply some academic research to this part of the process. A study conducted by Professor Robin Dunbar at the University of Oxford, England found that most humans can only maintain friendships with about 150 people. Apparently, this is due to the size of a human brain. If we are at 150 capacity and add another friend, we actually lose connection with someone from our network. This makes it incredibly important to pay

attention to who you put in your Pinger System. I will expand on this concept later.

2. **What: Defining a “Ping.”**

A ping is a very simple, unscripted connection with someone. In his book *Never Eat Alone*, Keith Ferrazzi defined a ping as “a quick, casual greeting, and it can be done in any number of creative ways. Once you develop your own style, you’ll find it easier to stay in touch with more people than you ever dreamed of in less time than you ever imagined.” (Ferrazzi 2005)

It’s difficult for me to expand on the definition from Keith, but I will point out that the key is to “develop your own style.” When you have your own style, you will come across

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as both authentic and genuine in your communications.

It can be challenging to figure out what to say when it comes time to ping someone in your system. Here is my simple formula for generating ideas to add value to your contacts:

Who - Who in my network can I connect this person to for a mutually beneficial relationship?

What - What mutual connection points do we enjoy on personal or professional level?

How - How can I promote their causes or interests in my network?

- 3. How: Which communications medium should I use for the ping?**

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When I started in the investment business, my options for pinging were limited to a phone call, hand written note, and showing up at their house or place of business. Then, with technological advances, we could start leveraging email and texting to the extent our compliance department would allow it. Today, the game has changed again. Thanks to the powerful reach of social media, you are now able to like, comment, post and message your contacts on these platforms. This means there are well over nine different ways to ping your contacts in an unobtrusive manner. In addition, any posting that you do on these platforms just serves as “gravy” on top of your regular pings!

I have seen some systems in the marketplace that will tell you which type of ping to deliver when a name shows up in your list for the

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day. In my experience, this is a flawed system because you need the flexibility to use whichever ping is most appropriate at that point in time.



4. **When: How often do you ping?**

Next, you need to define your “ping cycles.” By this, I simply mean: How often will you ping your contacts? I have built ping cycles of various sizes for myself and clients over the years. My first system had seven different cycles that included weekly, bi-weekly, monthly, bi-monthly, quarterly, bi-annual, annual and every two years. It was a massive system that had almost 1,500 contacts in it. After about a year, it failed miserably! This was before I had read Professor Dunbar's research.

Today, I use a very simple system for myself and my clients. If I add someone to my Pinger System, they are going to be contacted either **monthly, quarterly** or every **six months**. In my system, contacts are labeled **P1** (monthly), **P3** (quarterly) or **P6** (biannually) to denote the

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frequency of contact. After teaching financial advisors how to build these systems for the past three years, I can tell you the best results come from this simple cadence.

5. **Where: Selecting your technology**

It is imperative that you build a system on technology you are comfortable using on a daily basis. The greatest system in the world built on a complicated technology platform you are not comfortable using is *useless*. The main thing any system needs to have is a recurring task or reminder function that runs into perpetuity. Outlook, Salesforce, Act, Redtail, and Wealthbox will all work. I have built my own proprietary Excel-based system that you can download at jaycoulter.com/rab-pinger.

In addition to the recurring task or reminder function, there are three key components your technology platform must have:

1. **Simplicity:** If it is complicated, experience has taught me adoption

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goes down significantly after the first month.

2. Mobile Access: If you can ‘ping’ while in the airport or watching Little League, the utility of the system goes up exponentially.
3. Social Media Integration: If users can easily go from a contact screen to a LinkedIn or Facebook page, the pinging process is much easier.

Once you have built your Pinger System, it is time to jump start it with what I call the *Digital Supernova*.

Digital Supernova: Jump Starting Your Pinger System

Digital Supernova is a simple process I created to help my clients get some early wins in their relationship building efforts. The beauty of this system is that it does not cost anything except your time. It is also set up so your staff can help run this program for you.

I have had clients find great success with this program almost instantly after implementation. Most financial advisors uncover multiple six-figure opportunities. We have many stories of seven-figure relationships getting started and old friendships being reignited. One advisor shared with me a story in which he reconnected with a friend from high school he had not seen in decades. Two weeks later, this old friend and his wife were in that

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advisor's office putting together a retirement income plan.

Another advisor shared with me a situation in which he reconnected with a former client from 15 years earlier. When he reached out, the former client said, "I have been meaning to call you. I am about to retire and need some help." We later found out that he needed help because he had \$15 million in stock options. **This system is not magic.** It simply creates a process for you to do the activities that you know you should have been doing all along.

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Here is how it works:

1. Download your LinkedIn contacts into a CSV file. For instructions on exactly how to do this, visit the full tutorial and the download the **Digital Supernova Worksheet** at www.jaycoulter.com/rab-supernova
2. Copy and paste your LinkedIn contacts into the **Digital Supernova Worksheet**.
3. Go through each connection and label as such:
 1. **P1** - Someone you want ping once every month. (Don't designate more than 150 contacts this way.)
 2. **P3** - Someone you want to ping quarterly

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3. **P6** - Someone you want ping once every six months.
 4. **Client** - Someone who you don't need to ping because they are in your AB Client Touchpoint System. (See chapter on your AB Client Touchpoint System for reference.)
 5. **No** - Someone you don't need to ping at this time.
-
4. Add five 'P1' monthly pings per day to your Pinger System.
 5. Add five 'P3' quarterly pings per day to your Pinger System.
 6. Add two 'P6' bi-annual pings per day to your Pinger System.

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Note: If you have the resources on your team, have your staff add the pings to your **Pinger System**.

After you have set up your Pinger System and completed the Digital Supernova exercise, you are ready for LinkedIn lead generation using *The BEEP Method*.

The BEEP Method - Building Influence & Lead Generation

The BEEP Method



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BEEP is an acronym for **Build, Engage, Educate and Ping**. As you might imagine, it is a four-step process that requires customization to your unique brand and desired influence. This system is most effective when you have a niche in the market.

Here is the concept from a high level:

1. **Build:** Leveraging the optimal social media platform for your brand (most likely LinkedIn), script out a connection invitation that lays out the value proposition that speaks to WHY someone should connect with you.

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For example, my Connection Value Proposition as of this writing is: “I produce an industry podcast on practice management, the capital markets, and other issues advisors face called The Resilient Advisor. If you think it could add value to your business, here is a link: jaycoulter.com/listen. I would love to connect.

While you most likely do not produce a podcast today, it is helpful to have a piece of valuable content to entice the initial connection.

2. **Engage:** The next step is to build out a sequence of touchpoints where each communication adds value to your new connection. Scripting out the engagement sequence is the most

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difficult part of this process. The reason this drives results is simply because so few people will put in the work to get this done.

This step in the process should be continually refined and changed as you are building your brand and influence. I use a software automation tool on LinkedIn as well as an email automation sequence leveraging MailChimp. If there's any part of this system to outsource, this would be it!

The end of your engagement sequence should have a call to action. That call to action could be a phone call, business meeting or a cup of coffee. Here is an example of an *Engagement Sequence*.

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- a. Connection Value Proposition and acceptance
- b. Value-add Touch #1 (1 day later) - Deliver something of value!
- c. Value-add Touch #2 (15 days after #1)
- d. Value-add touch #3 (15 days after #2)
- e. Value-add touch #4 (15 days after #3)
- f. Value-add touch #5 (15 days after #3)
- g. Call to Action Touch (Call, Meeting, etc.)

Notice you will have provided five *Value Touches* over a two-month period before you ever ask them for something in return (your call to action). In addition, you will be educating them about you and your brand during that incubation period with the next step in the BEEP Process: Educate.

- 3. Educate:** This is the simplest part of the process, and thus yields the fewest results. I highly recommend creating your own original content through blogs, podcast or videos. If you are inclined, books and ebooks are incredibly effective. A robust education sequence simply involves

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posting on your preferred social media platforms on a regular basis.

Note: if you outsource this to your firm or a marketing company that enables other advisors to post the same content, *you will not get results*. The algorithms on the social media platforms today will instantly pick up that multiple people are posting the same article and not deliver it to the feed of your network.

- 4. Ping:** If someone has engaged with you through this process, but are not yet ready to become a client, it is imperative you *do not lose touch* with them. This is where your **Pinger System** comes into play. Apply these relationships to your system at the

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appropriate ping frequency to ensure you stay top-of-mind with these individuals. This helps guarantee you are the advisor of choice when they are ready to make a move!

The Impact List

For many financial advisors who have already reached a certain level of success, The BEEP Method is not necessary as it takes more of a shotgun approach to building their brand and influence. Experience has taught me that most seasoned advisors already know the families they would like to have as clients. I also know, however, that very few advisors put those families on a list or, more importantly, into a system to methodically nurture and build those relationships. This is where *The Impact List* will help you grow the relationships—on a granular level—that can have the highest impact on your business.

It is absurd the following statement is 100% accurate:

If you want to get a massive edge on your competition, make a list of your prospects.

I rarely run across an advisor who has a list of *any* prospects! **The Impact List** is designed to not only drive results by identifying your top prospects, but also by pushing you to build a list that will have a dramatic impact on your business over time. The Impact List process also methodically empowers you to find every possible connection point within your target so you can start building relationships and driving activity focused on the list.

Once you download the template for The Impact List, you or someone on your team needs to accumulate as much information as possible about the target. You will see that the information you need to acquire falls into three categories:

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1. *Digital Profile*
2. *Work Profile*
3. *Personal Interests*

The objective is to identify as many potential connection points as possible while building a complete profile of your prospect. This is hard work. Very few advisors will take the time to do it, and that is why it works! As the old saying goes, “You have to do what others will not do in order to have what others will not.”

As you build your Impact List, make sure to add them to your Pinger System so you are constantly building your influence and personal brand with them.

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Download **The Impact List** template and
watch the overview video here:

jaycoulter.com/rab-impact.

The Influence 100

The legendary sales trainer Chet Holmes, in his book *The Ultimate Sales Machine*, outlined a process and system for identifying your “Dream 100” clients and then methodically building a sales process to acquire them. It is no longer 1997, and this does not work for financial advisors as a “sales” system. If it did, the advisors who made the highest number of cold calls would have the largest businesses, and everyone knows that is not how it works!

I have a different take on Chet’s system that I have modified for today’s financial advisor and today’s interconnected world. **This tool is specifically for the financial advisor who wants to build their brand and influence inside of their niche and market.** As a disclaimer, this is very hard work. The goal of

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this system is to build credibility in your market by association **over a long period of time**. Find legitimate ways for them to see you, then you can set out to be seen with them in your market for credibility by association. This is a game of giving for an extended period of time before you will ever receive.

Download **The Influence 100** template for this process here: jaycoulter.com/rab-influence100.

Here is how it works:

1. Identify Influencers who serve your ideal clients, but don't compete with your services.
2. Break them into five groups:
 - a. Bloggers

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- b. Business Owners/List Owners
 - c. Podcasters
 - d. Social Media Influencer
 - e. News Media
(Print/Digital/TV)
3. Add your ‘*Influence 100*’ to your Pinger System and methodically ping them once per month or quarter to start building your brand awareness and shelf-space in their mind.
4. When the time is appropriate, reach out for a mutually beneficial collaboration.

A Final Thought on Relationship Marketing Systems

As you can see, the systems we've reviewed here are based on authenticity, a policy of providing real value, and relationship-building via regular contact. It's not easy to stay at the forefront of your prospects' minds, which is why it is so important to implement the systems in this section to ensure you and your team actual do it.

None of these systems are complex, but they are necessary if you want to grow your business as a financial advisor. Human beings are social creatures who make decisions based on relationships. Don't leave this piece of your business to chance! In my experience, most professional advisors do not enjoy sales and marketing. They will search high and low for an easy solution that does not require

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much effort on their part. The marketplace is full of service providers who will guarantee a full calendar of prospects, driven by social media, for a monthly fee. When my clients ask me about these types of services I usually tell them the ‘Acres of Diamonds’ story.

Acres of Diamonds

There is an old story of an African farmer, as told often by [Earl Nightingale](#), that has had an impact on the professional lives of thousands of people. Here is a condensed version:

A farmer heard tales about other people in his region who had made millions by discovering diamond mines. These tales so excited the farmer that he could hardly wait to sell his farm and go prospecting for diamonds himself. He sold his farm and spent the rest of his life wandering the continent searching unsuccessfully for the gleaming gems that brought such high prices. Worn out and in despair, he eventually threw himself into a river and drowned.

Meanwhile, the man who had bought his farm happened to be crossing the small stream on the property one day, when suddenly there was a bright flash from the stream bottom. He bent down and

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picked up a shiny stone, then brought it home and put it on his fireplace mantel as an interesting curiosity.

Several weeks later, a visitor picked up the stone, looked closely at it, and nearly fainted. He asked the farmer if he knew what he'd found. When the farmer said no, that he thought it was a piece of crystal, the visitor told him he had found one of the largest diamonds ever discovered.

*The farm the first farmer had sold so that he might find a diamond turned out to be one of the most productive mines on the entire continent. **The first farmer had owned acres of diamonds. But he sold them for practically nothing in order to look for them elsewhere.** If the first farmer had only taken the time to study and prepare himself to learn what diamonds looked like in their rough state, and to thoroughly explore the property he had before looking elsewhere, all of his wildest dreams would have come true.*

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There is a very good chance that there are enough diamonds in your personal and professional network. It just requires a system to find them!

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Jay Coulter, CFP®, CIMA® is an investment strategist and practice management consultant. His businesses are focused on serving investors, financial advisors, teams and firms. Jay is also the host of [The Resilient Advisor Podcast](#) as well as the author of [The Resilient Advisor](#) (2017) and [Conquer Worry](#) (2016). Jay holds an M.B.A. from the Goizueta Business School at Emory University and a B.S. in Business Management from The University of Tennessee. Jay has earned the [Certified Investment Management Analyst®](#) and [Certified Financial Planner®](#) designations.

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The Pinger System™

The Pinger System is part of a series of tools
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