LESSON 6

The Field Story Card

One story, one card. The customer is the hero, the struggle gets the most time, and every fact stays the way it happened.

1 · Permission first

Did the client say yes, in writing, to being named? If not, take every name out. Mixing a few real clients? Mark it a composite, and say so when you tell it.

Written yes on file (date)	Names removed	Composite (say so out loud)
☐ _____	☐	☐

2 · Fill the card

Write it the way it happened. You can change names, the town and the date. Never change what happened, what got in the way, how it ended, or the lesson. A loss stays a loss.

Example (fictional composite): a roofing owner, about 25 people. Wanted no more surprises at renewal. Two injuries, nobody walked him through either one.

Line	What you write
When and where	
The hero (a role like your buyer's, not you)	
What they wanted	
What got in the way (the struggle: give it the most words)	
What happened (facts unchanged)	
The lesson, in one sentence that serves the buyer's decision	

3 · Check every number

Round honestly: 58 → "about 60" is fine. 50 is not 60. Would someone who was there nod, or wince? If they'd wince, fix it.

Number in the story	As it happened	Source (file, email, report)

4 · Two lengths

Write a one-minute version and a two-minute version. Don't announce it. Just start: "The best example of that I've seen was..."

5 · The question it leads to

A good story ends in a question you can ask on the next first call.

Example: "What deposit is your current carrier holding, and on what schedule do you get it back?"

6 · Five-day log and Friday review

Keep your Morning Dig, opener and tally from Lessons 1 and 2. Tell the one-minute version on one real call. Friday: read the card to your manager. Who's the hero? Where's the struggle? Is every number the way it happened?

Day	Call where you told it (role only)	How they reacted, in their words
Mon		
Tue		
Wed		
Thu		
Fri review		

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