

New Prospective Client Sales Cycle

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SET THE STAGE

💡 = Big Idea

1. Design & Construct Your Plan

- Identify leading products, services & the client profiles they most align with.
- Identify pockets of client opportunity and key motivators.
- Establish activity & production goals for quarter.
- Establish strategy to reach daily activity and production goals.
- 💡 • Update or create professional biography.
- Update or create appointment requests, agendas and reminder.
- Update or create client process & brochure.

2. Preparation

- Finalize product presentations, sales decks, pitch books, slides, props.
- 💡 • Note Taking, Pen & Paper Strategy.
- Rehearse presentations & record for coaching and self diagnosis.
- Assemble value proposition, promo items, and partnership tools.
- Pre-signed Thank You cards.

3. Business Plan & Execution Strategy

- 💡 • Define primary objective for every sales interaction.
- Frame out your calendar for the quarter.
- Establish your marketing plan.
- Confirm the number of potential sales interactions & capacity.
- Confirm your minimum amount of production needed per interaction.
- Create or update top introduction referral source opportunity list.

ASK LISTEN FIND

4. Opening Conversation Words & Verbiage

- What gift should you have?
- The first words can determine the outcome theme.
- The only important words are the ones the client wants to hear.
- If it is not remarkable don't say it.
- 💡 • Address agenda or set one up with WIIFM expectations.
- Baseline questions tell us how far we are in the process.

5. Open-Ended Questions & Strategic Note Taking

- Can you describe your best day in retirement or dreams?
- Are there any questions or specific needs you need to discuss first?
- I don't want to take my understanding of your business for granted, any updates?
- Where are you at with your goals year to date? How do you feel?
- How did you get to where you are today?
- What improvement need to be made?
- 💡 • Golden silence note taking.

6. Identify Ideal Opportunity, Client Need or Strategy

- Based on my notes, here are some opportunities, where should we start?
- Thanks for sharing, I think we have something you might love to discuss!
- Gain agreement to continue or backtrack to see where you went wrong.
- 💡 • The best way to see if we have business chemistry is to work on a need.
- Pre-Close Commitment for "First Right of Refusal".

7. Position Your Best Solution or Strategy

- Walk through your well rehearsed solution or partnering strategy.
- Use client approved material only.
- Focus on what it means to take action and the value of implementation.
- What would it mean to not take action?
- 💡 • How to know if your prospect is buying in. Awareness.

CLOSE THE LOOP

8. Quantify The Value

- Discuss best days ever — details, dates, people.
- 💡 • Make clear the value of taking action in time, revenue and fun.
- Gain agreement that the potential value warrants taking action.
- Establish a timeframe and deadline to take action and completion.
- Make clear the scarcity of your time and resources, gain commitment.

9. Action Steps

- 💡 • Pre-close commitment review.
- What is needed to make the process as easy as possible?
- What information and support is needed?
- Confirm next action step dates and date of presentation if known.
- Develop a formal shared plan for substantial opportunities.
- Schedule next meeting prior to ending sales interaction.

10. Follow Through Exceeding Expectations

- You quarterback top opportunities, leave nothing to chance.
- Establish and confirm expectations and communication strategy.
- Debrief team and set their expectations and responsibilities.
- 24 Hour awareness check-in for momentum & to communicate trust.
- 💡 • Handwritten thank you notes, messages and gifts.

11. Next Opportunity & Referral Process

- I am still selectively expanding my business and need your help! (bio)
- Who do you know like you that might benefit from my services?
- 💡 • Who do you know on This List that you can introduce me to? (bio)
- 💡 • Let's review the other opportunities from our meeting notes! (bio)