

New Prospecetive Client Sales Cycle

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SET THE **STAGE**

-\(\hat{\chi}\)- = 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.
- -\(\hat{-}\)- 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.

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.



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

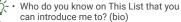
- Pre-close commitment review.
 - · What is needed to make the process as easy as possible?
 - What information and support is needed?
 - · Confirm next action step dates and date of presentation if known.
 - · Develop a formal shared plan for substantial opportunities.
 - Schedule next meeting prior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

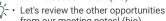
10. Follow Through **Exceeding Expectations**

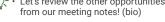
- · You quarterback top opportunities, leave nothing to chance.
- Establish and confirm expectations and communication strategy.
- · Debrief team and set their expectations and responsibilities.
- · 24 Hour awareness check-in for momentum & to communicate trust.
- -\(\)- Handwritten thank you notes,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







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