# CATALYST4GROWTH

### **Sales Process**

catalyst4growth.org

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# **SET** THE **STAGE**

 $-\dot{\Omega}$  = Big Idea

# 1. Design & Construct Your Plan

- · Identify leading products & the client profiles they most align with.
- · Identify pockets of financial professional opportunity and key motivators.
- Establish activity & production goals for guarter.
- · Establish strategy to reach daily activity and production goals.
- Update or create professional biography.
  - · Update or create FP appointment requests, agendas and reminder.
  - Update or create sales presentation pieces & key selling points/features.

#### 2. Preparation

 Finalize product presentations. sales decks, pitch books, slides,



- 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



- Find at least one client to compete for in every interaction theme.
  - · Frame out your calendar for the
  - · Establish your territory rotation.
  - · Confirm the number of potential FP interactions available.
  - Confirm the minimum amount of production needed per interaction.
  - Create or update top FP Opportunity List.

# **ASK** LISTEN **FIND**

#### 4. Opening Conversation Words and Verbiage

- · 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

- · Are there any client situations or specific needs you need to discuss?
- I do not want to take for granted I understand your business, any updates?



- Where are you at with your revenue goals year to date?
- Can you review your client acquisition process with me?
- · How did you get into this business?

#### 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 client.
- Pre-Close Commitment for "First Right of Refusal".

## 7. Position Your Best Solution or Strategy

- · Reverse role play when there is less familiarity with your solution.
- · Walk through your well rehearsed solution or partnering strategy.
- · Use client approved material whenever
- · Focus on what it means to take action and the value of implementation.
- Show how to close in your reverse roll play presentation.

# **CLOSE** THE **LOOP**

## 8. Quantify The Value

- \*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

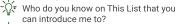
- · What is needed to make the process as easy as possible?
- · What materials and tools or support is needed?
- · Confirm next action step dates and date of presentation if known.
- \*Develop a formal shared business plan for substantial opportunities.
- Schedule next meeting prior to ending sales interaction.

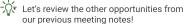
#### 10. Follow Through -Exceeding Expectations

- · 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

- · How many other similar clients or prospects do you have?
- · I am still expanding my territory and need
- · Who do you know like you that might utilize my services?





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