

Sales Process

catalyst4growth.org
4969 Bayshore Blvd
Tampa FL 33611

**SET
THE
STAGE**

 = 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 quarter.
- 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, 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

- Find at least one client to compete for in every interaction theme.
- Frame out your calendar for the quarter.
- 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 possible.
- 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 your help!
- Who do you know like you that might utilize my services?
- Who do you know on This List that you can introduce me to?
- Let's review the other opportunities from our previous meeting notes!