CATALYST4GROWTH

Financial Professional Sales Process

catalyst4growth.org

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SET THE **STAGE**

 $-\dot{\Omega}$ = 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
- Establish activity & production goals for guarter.
- · 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 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 opportunity to compete for in every interaction theme.
 - · Frame out your calendar for the
 - · Establish your territory rotation.
 - Confirm the number of potential sales interactions available.
 - · Confirm the minimum amount of production needed per interaction.
 - · Create or update top introduction 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

- · Can you describe your best day in
- · Are there any 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 goals year
- · How did you get to where you are today?



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 whenever
- · Focus on what it means to take action and the value of implementation.
- What would it mean to not take action?
- Is your client buying in?

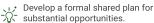
CLOSE LOOP

8. Quantify The Value

- · Discuss best days ever details, dates,
- 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 information and support is
- · Confirm next action step dates and date of presentation if known.



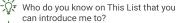
· Schedule next meeting prior to ending sales interaction.

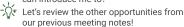
10. Follow Through -Exceeding Expectations

- · 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 needs do you have?
- · I am still expanding my business and need your help!
- · Who do you know like you that might utilize my services?





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