

# Sales skills

## Being a trusted advisor

For those tasked with developing trusted and advisory relationships with clients.

This program has been run with wealth advisors working with high net clients, wholesalers selling to brokers, group insurance associates servicing businesses, and corporate and investment bankers.

### Content includes:

- Understanding how buying behavior is changing and how this affects your sales process
- Using a question-asking 'ladder' to pull clients in rather than push product
- Presenting product information as concise 'benefit capsules'
- Managing and closing client meetings in a manner that builds trust
- Following-up and building relationships between meetings.

## Selling to businesses

For financial services professionals involved in B2B selling.

This program has been offered to corporate and investment bankers, advisors working with institutional asset managers, group insurers, and real estate investment professionals.

**Content** draws on the **Trusted Advisor** agenda but focuses on *selling high-value services to businesses* rather than B2C sales.

In addition, this program draws on the insights of *Challenger Selling* about the importance (in B2B) of providing the client with contrarian ideas.

## These are sample programs.

### We will custom-build a program for you – at a Master or Executive level - that is:

- **Work-based:** Client-relevant cases and roleplays drive business impact.
- **Tailored:** Challenge is calibrated to each participant's needs and level.
- **Flexible:** Range from one day to two days in length.
- **Impact-focused:** On-the-job coaching turns new skills into productive habits.

## Telephone-based prospecting

For people faced with 'cold call' prospecting, using telephone and email.

Investment advisors, mutual fund wholesalers, corporate bankers and group insurance associates have all participated in custom-built variations of this program.

Through telephone-based, participant-defined, and expert-led roleplays **this program covers:**

- What prospects want and don't want to hear (especially in a telephone cold call)
- Using voicemails productively: Finding a 'hook' that drives a callback
- Personalizing the corporate story to create a personal credibility statement
- How questions, listening, your voice, and threading in a prospect's ideas build a productive conversation.

## Women and wealth

Women constitute a rapidly growing and often neglected wealth sector. This program is designed to refine the manner in which advisors, trust administrators, portfolio managers and private bankers work with high net worth women.

Many of the skills covered in **Trusted Advisor** are taught here, but with a focus on understanding women investors.

### Additional content includes:

- Understanding gender differences in values and buying criteria
- Adapting your sales approach, where gender differences matter
- Running productive meetings with couples.

Also run for wholesalers selling to women advisors or bankers pitching to women CEOs.

## Cross-selling and up-selling

For corporate and investment bankers, advisors, real estate investment professionals, insurance associates (and others) tasked with developing more lucrative relationships with existing clients.

**Content** is a structured SMART-selling process to refine your sales process:

- Opening: Position an 'ideas' rather than an 'update' meeting
- Pitching: As 'benefit capsules' not products
- Questioning: Cultivate a desire to act
- Managing: Reframe, probe and listen
- Closing: Ensure a forward momentum
- Sustaining: Build interest between meetings.