

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

RETIREMENT RETENTION AND THE FINALS PROCESS From Invite to Good Night™

Bill Walton Sales Training specializes in helping Retirement providers retain their most coveted accounts and to sell more consistently within a consultant-led finals process.

Client Relationship Management

Clients are departing from their old ways of assessing the value in their relationship with providers. As a result, Relationship Management leaders need to be more proactive in bringing rich stakeholder-specific insights to stay relevant beyond the plan.

The Focus

BWST delivers The Value Creation Workshop for Relationship Management™ providing Institutional Relationship Management groups with tools, strategies and messaging to leverage their entire organization in creating client value:

- Positioning your firm's value proposition
- Mapping an organization's key stakeholders
- Unlocking sources of value in the relationship
- Uncovering reliable paths of influence and support
- Case study approach to creating insight-driven messaging for interacting with procurement

Sales and the Finals Experience

BWST's Value Creating Finals Process Workshop™ (VCF) does more than just teach presentation skills. Our approach incorporates your organization's core value proposition and maximizes the interaction of sales and support teams in live role-play scenarios.

The Focus

The experience harnesses the coordinated presentation of teams to meet the needs of multiple stakeholders and the requirements of the RFP.

- Creating a more compelling message that enhances personal and overall team impact
- Anchoring the value they bring to the Finals presentation to enhance their credibility
- Managing transitions to other speakers in a way that builds momentum for your message
- Analyzing, addressing and winning over tough audiences
- Mastering the Q & A process with greater authenticity and empathy

Sample Client Listing

**Bank of America
Merrill Lynch**



ABOUT

Bill Walton Sales Training (BWST) is a sales training and coaching firm dedicated to supporting client-facing professionals in Retirement. The firm works with Financial Advisors, Relationship Managers and Institutional Salespeople to help them "mean more" key stakeholders. BWST's suite of training programs, tools, and case studies are helping Retirement organizations keep and win coveted clients. Based in Princeton NJ, BWST works with Large and Mid-Market plan providers.

Visit us on the web at www.billwaltonsalestraining.com