BILL WALTON
SALES TRAINING™

Ph: 917.439.3271
e: bwalton@billwaltonsalestraining.com

VALUE CREATION SPECIALISTS

CLIENT ACQUISITION IN FINANCIAL SERVICES

PERSONAL EFFECTIVENESS: CREATING A SUSTAINABLE EDGE

Business Challenge

Most financial professionals are smart, credentialed and well meaning. But not all have the insight or bandwidth to seize all opportunity all of the time. In fact, current client demands and compliance matters are siphoning off energy needed to sustain a strategic practice growth effort. Often what's needed is a process to ensure client facing professionals are leveraging their vitality and creativity as well as their solution's performance attributes.

The Focus

In this tools-driven program, financial professionals learn to create and sustain full engagement in their work. In addition to productivity boosting tools such as their Perfect Week, to adopt a *time-slot* strategy for their outreach, and take a "*Big 6*" approach to what's realistic to accomplish in one business day. This program allows for best practice share and peer coaching and helps financial professionals expand their idea of what can get done and when.

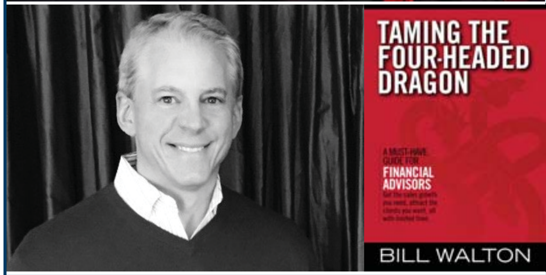
Key Content

- Debunking the multi-tasking myth
- Creating the perfect day and the perfect week
- Living up to 21-day personal growth commitments
- The Big 6 List – getting the right things done
- Doing what's "closest to the money" first
- The Clean 10 – keeping the office space a place of productivity
- Improving your personal decisiveness

Outcomes

By participating in *Creating a Sustainable Edge*™ participants will be able to:

- Craft a 21-day productivity improvement plan
- Understand their personal source of productivity
- Manage the four demands on their time: Clients, Prospects, Networking and Compliance
- Move quickly out of funks and procrastination
- Reduce the pressure they feel when there's so much to do
- Manage their energy, more than their time for personal success and renewal



WHO WILL BENEFIT

Personal Effectiveness: A Financial Professional's Survival Kit™ is designed for Financial Professionals and distribution executives that balance the often conflicting priorities of practice development, relationship management and compliance and administration. Perfect for those who need to jumpstart their vitality, motivation and enthusiasm to sustain a competitive practice development effort.

DELIVERY

Personal Effectiveness: A Financial Professional's Survival Kit™ is delivered in two-hour and half-day formats.

ABOUT

Bill Walton Sales Training (BWST) is a sales training and coaching firm dedicated to supporting client-facing professionals in Wealth Management. The firm works with Private Client Executives, Financial Advisors and Insurance salespeople to help them "mean more" to their clients. BWST's suite of training programs, tools, and post program coaching helps these organizations achieve results their clients can measure. Based in Princeton NJ, BWST works with Wirehouse firms, Trust and Estate providers and Fortune 500 Asset Managers that see value in maximizing the advisor/client interaction.