BILL WALTON SALES TRAINING™

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CLIENT ACQUISITION SPECIALISTS

CLIENT ACQUISITION IN INSURANCE™

A GIVING HAND IS ALWAYS FULL™: A ROADMAP TO LASTING COI RELATIONSHIPS

Business Challenge

Centers of Influence want what you want – more business. But what COIs want from insurance professionals and their agency can be something entirely different. This program addresses the common categories of COIs, their sources of value, and specific relationship building tactics insurance professionals can adopt to attract them.

The Focus

Participants are given a window into their most common centers of influence - what they covet, where they struggle, and where they need the support of a partner. **A Giving Hand is Always Full**™ helps insurance professionals expand their idea of who can be a center of influence and offers pathways for connecting with them. This program provides the strategy, messaging and meeting management tips to move COIs from mere "acquaintance" to a strategic partner.

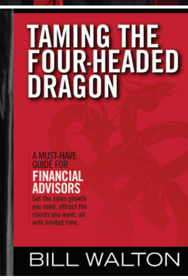
Key Content

- Adopting a COI mindset – **A Giving Hand is Always Full**™
- Sleuthing skills to qualify the right COI
- Thinking beyond CPAs and Attorneys
- Contact management strategies
- COIs and sources of value
- Seeing the client through the lens of the COI
- Referrals vs. Introductions – knowing what you're asking for
- Keeping balance in the relationship
- Communicating your value prop to COIs

Outcomes

By participating in **A Giving Hand is Always Full**™ participants will be able to:

- Assess fit and balance in a COI relationship
- Adopt proven tools for COI outreach
- Shape messaging that helps COIs understand your value
- Grow referral sources beyond CPAs and Attorneys
- Manage initial COI interactions to mutual benefit
- Leverage tools and tactics to help your COIs grow
- Balance the relationship to an equitable give and take



WHO WILL BENEFIT

A Giving Hand is Always Full ™ is designed for insurance producers that need to drive more business via introduction and referral.

DELIVERY

A Giving Hand is Always Full ™ 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 Financial Services. The firm works with Private Client Executives, Bankers 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 Asset Managers, Banks and Insurance Brokerages that see value in maximizing the client interaction.

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90-DAY DASH™

Business Challenge

Business leaders and consumers are bombarded by calls from insurance salespeople. Most have assistants screening their email and no one answers a call from someone they don't know. In fact, over 90% of voicemails never get returned. Producing agents and brokers need an easy to execute a process for generating leads – one that leverages what's working and integrates new social tools and messaging for outreach.

The Focus

The **90-Day Dash**™ is a 90-day prospect development process designed to create consistent effort, speed, and perseverance. We designed this program to create focus and tempo for an integrated lead generation effort. The program is driven through a high-impact seminar with 90-days of follow-on coaching. Participants create foundation of ideal prospects, a compelling message, and a syncopated touch process for acquisition.

Key Content

- Developing a 7-Touch Strategy™
- Positioning yourself as a specialist
- Developing your unique elevator pitch and ideal client declaration
- Client-type marketing and referral strategies
- Mastering The Coffee Talk, Discovery and Recommendation meeting
- Recruiting Centers of Influence
- Simple social media strategies
- The Perfect Day and Perfect Week – creating a rhythm for client acquisition

Outcomes

By participating in **90-Day Dash**™ participants will be able to:

- Take comfort in a refined new client plan
- Determine where to go and what to say to new prospects
- Create more compelling relationships with COIs
- Develop a plan of touches that brands them as a trusted specialist
- Manage the time necessary for a coordinated prospecting effort

WHO WILL BENEFIT

90-Day Dash™ is designed for producers in insurance that need a disciplined approach to new client acquisition.

DELIVERY

Delivered as a 4-hour workshop with pre-work, custom case study and 90 days of situation-based accountability coaching.

ABOUT

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CLIENT ACQUISITION IN INSURANCE™

PERSONAL EFFECTIVENESS: AN INSURANCE PROFESSIONAL'S SURVIVAL KIT

Business Challenge

Most insurance 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 administrative matters are taking valuable time away from prospecting and practice development. Often what's needed is a process for getting the right work done right.

The Focus

In this tools-driven program, insurance professionals learn to create 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 insurance professionals expand their idea of what can get done and when.

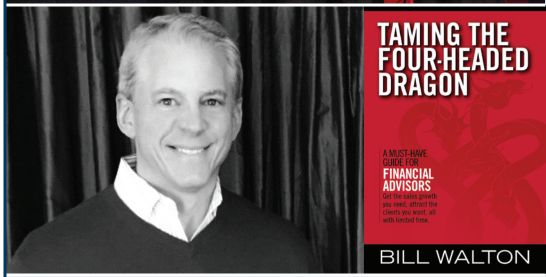
Key Content

- Debunking the multi-tasking myth
- Creating the *perfect day* and the *perfect week*
- 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 a place of productivity
- Improving your personal decisiveness

Outcomes

By participating in **Personal Effectiveness: An Insurance Professional's Survival Kit**™ 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 Administration
- 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: An Insurance Professional's Survival Kit™ is designed for insurance professionals that balance the often conflicting priorities of practice development, relationship management and administration. Perfect for agents in need of greater productivity in their approach to growth in their book.

DELIVERY

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

ABOUT

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CLIENT ACQUISITION SPECIALISTS

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TELLING YOUR STORY: VALUE PROP MIXOLOGY

Business Challenge

Prospects respond to how producers describe their agency's value and their own. This program helps insurance professionals create a firm and personal elevator pitch that states why other clients choose to work with them, and why the prospect would be interested in learning more.

The Focus

Prospects want to hear an agent's credibility and issue fluency – this workshop helps agents communicate that through three levels of messaging: a 12-word tagline, a 45-second elevator pitch and a 2-minute value proposition that answers the "*why should I work with you?*" question.

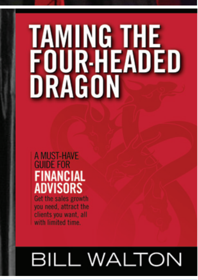
Key Content

- Profiling your ideal client: Client type/Problem/Solution profiling model
- Knowing the dimensions on which you compete
- Articulating your impact, knowledge and "issue fluency"
- Tagline development
- Elevator Pitch Creation
- Four-part Value Proposition composition

Outcomes

By participating in **Telling Your Story: Value Prop Mixology**™ participants will be able to:

- Speak to why other clients chose to work with them
- Articulate a client type focus without the limitations of "niche" targeting
- Decide on the most relevant practice "value" factors that matter most to ideal prospects and clients.
- Craft three levels of messaging to support their brand of advisement: a tagline, an elevator pitch and a four-part value proposition.
- Establish common ground by putting their messaging into context for multiple stakeholders, including COIs.



WHO WILL BENEFIT

Telling Your Story: Value Prop Mixology™ is designed for producers, captive agents and brokers that need to distinguish themselves from the competition.

DELIVERY

Telling Your Story: Value Prop Mixology™ is delivered in two-hour and half-day formats.

ABOUT

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CLIENT ACQUISITION SPECIALISTS

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TAKING THE STRESS OUT OF ASKING FOR THE BUSINESS™

Business Challenge

Closing effectiveness among insurance producers is declining. Bill Walton Sales Training's recent survey of agency principals revealed that in 75% of prospect interactions, their advisors were not requesting commitment. The demands of existing client pressures, administration, and new regulatory changes have made prospecting more of a get-to-it-when-I-can activity vs. a daily discipline. The result – a tactical, transactional approach to prospecting that is turning prospects off.

The Focus

Participants are provided an interaction model that outlines valuable prospect-focused activity from prospecting to close. A last call/next call rolling engagement model helps insurance professionals know what do and when while building momentum for an "ask". Participants will learn to present solutions with context – using the actual spoken words of prospects to ask for the business. The program provides sample scripts and statements of beneficial value that they can apply immediately to secure commitment.

Key Content

- An industry-accepted sales process and engagement model
- Getting over the trust barrier with prospects
- What to expect from three types of prospect meetings
- Discovery questions that shape any type of "ask"
- Mastering the art of "playback"
- Summarize and Suggest framework for asking for the business

Outcomes

By participating in **Taking the Stress out of Asking for the Business**™ participants will be able to:

- Create a commitment objective for every meeting they take
- Use prospects' spoken words to shape a close
- Understand the psyche of the prospect as you advance through the sales process
- Adopt a rolling engagement model that demonstrates the value of the next meeting
- Clearly articulate the value of moving forward by asking for specific prospect commitment.

WHO WILL BENEFIT

Taking the Stress out of Asking for the Business™ is designed for insurance producers and agents that have earned the right to ask for specific commitment from prospects. Perfect for those that experience high levels of procrastination and delay in their prospecting efforts.

DELIVERY

Taking the Stress out of Asking for the Business™ is delivered in two-hour and half-day formats.

ABOUT

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