BILL WALTON SALES TRAINING™

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN FINANCIAL SERVICES™

THE VALUE CREATION TEAM SELLING WORKSHOP™

Business Challenge

Clients have radically departed from their old ways of assessing the value in their relationship with sales teams. They're armed to the gills with rich data on the impact of your solution and compliance demands are driving floods of well-scoped RFPs for even the most revered suppliers. As a result, Sales and Relationship Management teams need to move from being responsive, to being more proactive with stakeholder-specific insights that connect to the client's business beyond your solution.

The Focus

The Value Creation Workshop™ provides institutional Sales and Relationship Management groups with tools, strategies and messaging to leverage their entire organization in creating client value. Participants will learn a manner of proactive relationship management that uncovers the self-interests of a broader set of stakeholders while creating crisp messaging that stimulates genuine curiosity. Contact and conversation management strategies are provided against the backdrop of a relevant and custom-tailored case study and exercises. A Value Creation Think Tank module provides teams the flexibility to create solutions for clients, consultants, and purchasing that transcend their products and services.

Key Content

- Learning to avoid a commodity trap for your products and solutions
- Crafting hypotheses of value for target accounts and relevant stakeholders
- Uncovering reliable paths of influence and support with Organization Decision Maps
- Creating insight-driven messaging for executives, consultants, and procurement
- Stimulating dialogue and fostering the "second" meeting
- Managing clients ongoing to grow the relationship and avoid RFPs

Outcomes

By participating in **The Value Creation Workshop™** participants will learn to:

- Map an organization and prepare stakeholder-specific engagement strategies even before making contact
- Leverage research and preparation to inform messaging and insights relevant to the client
- Create the right conversations that validate clients and informs where teams can drive value
- Test solutions with your team and with clients to assess fit
- Employ strategies that actually enhance and grow the relationship and shorten the sales cycle
- Involve their own organization in creating value for accounts

WHO WILL BENEFIT

The Value Creation Workshop™ is designed for seasoned Sales Executives and Relationship Managers who need to add value to clients in an important, ongoing relationship.

DELIVERY

Delivered as a 2-day workshop with 90 days of situation-based reinforcement delivered via the web.

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.