BILL WALTON
SALES TRAINING™

Ph: 800.858.8194
e: bwalton@billwaltonsalestraining.com

VALUE CREATION SPECIALISTS

VALUE CREATION IN FINANCIAL SERVICES

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 advisors and their partners can be something entirely different. Credible networking sources are looking to make a valuable impact on their contacts by providing a trusted resource. And that is you. This program addresses the common categories of COIs, their sources of value, and specific relationship building tactics financial 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 financial 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.

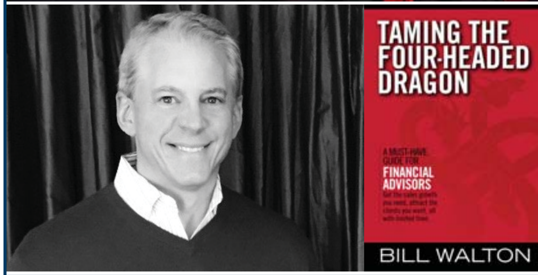
Key Content

- 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 Financial Professionals and the distribution executives that support them that need to drive more business via introduction and referral. Perfect for advisors that have exhausted most traditional list management strategies and have something to offer those that can refer.

DELIVERY

A Giving Hand is Always Full ™ is delivered in two-hour and half-day formats. A perfect program for Value Added teams in the fund and annuity space.

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.