BILL WALTON SALES TRAINING™

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VALUE CREATION SPECIALISTS

VALUE CREATION IN FINANCIAL SERVICES

TAKING THE STRESS OUT OF ASKING FOR THE BUSINESS™

Business Challenge

Closing effectiveness among financial advisors is declining. Bill Walton Sales Training's recent survey of complex managers 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 advisors know what do and when while building momentum for an "ask". Financial Professionals 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 advisors can apply immediately to secure commitment.

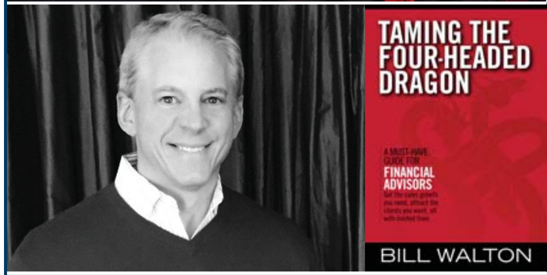
Key Content

- 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 Financial Professionals and the distribution executives that support them have earned the right to ask for specific commitment from prospects. Perfect for advisors 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. 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.