BILL WALTON SALES TRAINING™

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CLIENT ACQUISITION EXPERTS

# CLIENT ACQUISITION IN FINANCIAL SERVICES™

## THE 90-DAY DASH PROSPECTING SYSTEM™

### Business Challenge

All financial professionals know that it pays to be on constant lookout for new business. But with the demands of existing clients and a constant flow of administration, new business growth often takes a back seat. Couple that with the changing expectations of client value and prospecting becomes harder. What financial professionals need is an easy execute plan that gives them the messaging and contact management tools to win more often.

### The Focus

The **90-Day Dash Prospecting System**™ is a 90-day prospect development process designed to help financial professionals systematically grow their new business portfolio. By combining art and science, the **90-Day Dash Prospecting System**™ gives participants a time-tested process to help them reach their business goals and secure qualified, new relationships. It's designed to strategically eliminate the "noise" from client acquisition and highlight a unique brand and value. Participants lock in on ideal prospects, craft messaging that resonates and apply a touch strategy to improve the hit rate on meeting requests.

### Key Content

- Developing a 7-Touch Strategy™
- Creating a "stream of consciousness" with prospects
- Developing your unique elevator pitch
- Referral strategies from COIs
- Personal time and opportunity management strategies
- The **90-Day Dash Prospecting System**™ business development dashboard
- Prioritizing your prospects for maximum penetration
- The Bill Walton Sales Training relationship building tool

### Outcomes

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

- Determine who to target and where to find them
- Craft messaging that states why other clients choose to work with them
- Know exactly where to find their ideal prospects
- Develop a plan that compels prospects to want to connect
- Outsell their competition by identifying with prospects' dissatisfaction with their current situation.

### WHO WILL BENEFIT

The **90-Day Dash Prospecting System**™ is perfect for financial professionals who need to reach hard-to-get prospects to grow their business.

### DELIVERY

Bill Walton Sales Training's **90-Day Dash Prospecting System**™ is a 3-month intensive business development program that kicks off with an engaging 4-hour seminar complete with tools and tip sheets. Follow-up coaching is provided by trained BWST facilitators and/or certified client coaches.

### 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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