BILL WALTON SALES TRAINING™

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VALUE CREATION SPECIALISTS

VALUE CREATION IN FINANCIAL SERVICES

TELLING YOUR STORY: VALUE PROP MIXOLOGY

Business Challenge

Prospects respond to how an advisor describes situations they can personally relate to. Helping prospects see themselves in the relationship engenders trust and staves off procrastination. *So why aren't advisor value props better*? Too many advisors fail to state why their clients work with them, and why specifically the prospect would be interested. Any prospect worth attracting is likely with another advisor – the reason for change must be compelling.

The Focus

Prospects want to hear an advisor's credibility and issue fluency – this workshop helps advisors 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.

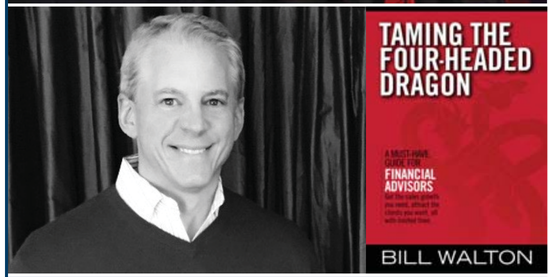
Key Content

- 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 Financial Professionals and the distribution executives that support them that need to tell a differentiated story in order to attract high-value prospects.

DELIVERY

Telling Your Story: Value Prop Mixology™ 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.