BILL WALTON SALES TRAINING™

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

THE VALUE CREATION WORKSHOP™

Business Challenge

Clients have radically departed from their old ways of assessing the value in their relationship with you. 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 leaders 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 you both 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.

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BILL WALTON SALES TRAINING™

CLIENT ACQUISITION SPECIALISTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

THE VALUE PROPOSITION WORKSHOP™

Business Challenge

Communicating how firms provide value in today's increasingly commoditized Wealth Management landscape has become a business imperative for clients but why they stay is typically contextual. This context is often grounded in the unique brand of support you're providing relative to a need and your unique way of delivering it. The problem - from TV ad to advisor there is too much variability in how this value is getting communicated and lines of differentiation are getting blurred.

The Focus

BWST provides financial professionals and their leadership with messaging that answers the "Tell me about your firm" question. Our process is simple to execute as we help you answer 4 questions: *How do you help clients and people like them? What problems do you solve, and what needs do you address that help me reach my goals? What type of impact do you help people and businesses achieve? What are your credentials that say you know how to solve my problem and that you have a special process to do it?*

Key Features

- Prework and readings related to the underpinnings of successful value propositions and the prioritization of factors that contribute to client value.
- Data collection that compiles and characterizes all branded solution messages for key competitors and your own (includes client interviews).
- Stakeholder mapping that includes the network of client contacts most impacted by the value your solution delivers with a connection to their need.
- Prioritization of key factors and attributes relevant to your solution.
- Collaborative section-by-section creation of your firm's value proposition.
- Group review of final draft with authoring support from ProDirect.

Outcomes

By participating in **The Value Proposition Workshop**™ participants will create:

- Three levels of messaging to support your solution: a tagine, elevator pitch and 4-section value proposition.
- Agreement on your solution's "value" factors that matter most to clients.
- A client feedback loop for use in augmenting or improving your solution.
- Value creation support for sales and ongoing relationship management teams.
- Collaboration among internal marketing and product stakeholders.

WHO WILL BENEFIT

The Value Proposition Workshop™ is perfect for process and platform owners and those who sell these solutions. The program is a collaborative effort among all who can influence the sale and the ongoing relationship.

DELIVERY

Delivered as a 1-day workshop complete with prework, team exercises and authoring support from seasoned Bill Walton Sales Training facilitators and messaging experts.

ABOUT

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CLIENT ACQUISITION SPECIALISTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

RETIREMENT RETENTION AND THE FINALS PROCESS
From Invite to Good Night™

Bill Walton Sales Training specializes in helping Retirement providers retain their most coveted accounts and to sell more consistently within a consultant-led finals process.

Client Relationship Management

Clients are departing from their old ways of assessing the value in their relationship with providers. As a result, Relationship Management leaders need to be more proactive in bringing rich stakeholder-specific insights to stay relevant beyond the plan.

The Focus

BWST delivers The Value Creation Workshop for Relationship Management™ providing Institutional Relationship Management groups with tools, strategies and messaging to leverage their entire organization in creating client value:

- Positioning your firm's value proposition
- Mapping an organization's key stakeholders
- Unlocking sources of value in the relationship
- Uncovering reliable paths of influence and support
- Case study approach to creating insight-driven messaging for interacting with procurement

Sales and the Finals Experience

BWST's Value Creating Finals Process Workshop™ (VCF) does more than just teach presentation skills. Our approach incorporates your organization's core value proposition and maximizes the interaction of sales and support teams in live role-play scenarios.

The Focus

The experience harnesses the coordinated presentation of teams to meet the needs of multiple stakeholders and the requirements of the RFP.

- Creating a more compelling message that enhances personal and overall team impact
- Anchoring the value they bring to the Finals presentation to enhance their credibility
- Managing transitions to other speakers in a way that builds momentum for your message
- Analyzing, addressing and winning over tough audiences
- Mastering the Q & A process with greater authenticity and empathy

Sample Client Listing

Bank of America Merrill Lynch · Nationwide® · Prudential · ICMA-RC Building Public Sector Retirement Security · John Hancock® Retirement Plan Services

ABOUT

Bill Walton Sales Training (BWST) is a sales training and coaching firm dedicated to supporting client-facing professionals in Retirement. The firm works with Financial Advisors, Relationship Managers and Institutional Salespeople to help them "mean more" key stakeholders. BWST's suite of training programs, tools, and case studies are helping Retirement organizations keep and win coveted clients. Based in Princeton NJ, BWST works with Large and Mid-Market plan providers.

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

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**™ 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™ 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**™ 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**™ 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**™ 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**™ 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

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

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 financial professionals 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.

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

TAKING THE STRESS OUT OF ASKING FOR THE BUSINESS™

Business Challenge

Closing effectiveness among financial professionals 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

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

SALES MANAGEMENT FORUM™

Business Challenge

Sales Managers today are finding themselves in the midst of a paradox; the need to satisfy a "results now" mandate while developing people over time. Charged with squeezing every last dollar out of the pipeline to stay competitive, sales managers must have real-time visibility into the talent on their teams to ensure the full value from every opportunity.

The Focus

The **Sales Management Forum**™ is designed to help leaders better manage the talent and processes on their teams. Sales leaders learn to maximize the productivity and overall effectiveness of their human capital while fostering a self-managed high performance culture. The Sales Management Forum focuses on the need to support salespeople uniquely through all stages of the sales process. Participants learn that what they say is not half as important as when they say it. Four sales management disciplines are introduced: *The Enabler, The Business Manager, The Visionary, and The Expert.*

Key Content

- Managing through a validated sales process
- Understanding the individual needs and motivations of all levels of sales talent
- Creating a sales performance and career management bond
- Setting performance objectives and coaching for goal attainment using scorecards and pipeline tools
- Giving and receiving performance feedback
- Coaching producers through a pipeline process

Outcomes

By participating in the **Sales Management Forum**™ participants will be able to:

- Achieve sales targets more consistently
- Create a more compelling relationship with producers and distribution partners
- Engage the total organization beyond Sales
- Recruit, train, and retain the best sales talent
- Field a sales team that is an extension of the brand

WHO WILL BENEFIT

The **Sales Management Forum**™ is for senior sales leaders looking to get more from their people and their organization. Perfect for those who manage producers and those who support them across all levels of the sales talent spectrum.

DELIVERY

Delivered as a 1-Day session with optional follow-on coaching

ABOUT

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

TELLING YOUR STORY: VALUE PROP MIXOLOGY

Business Challenge

Prospects respond to how a financial professional describes situations they can personally relate to. Helping prospects see themselves in the relationship engenders trust and staves off procrastination. *So why aren't value props better*? Too many 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 your 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

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CLIENT ACQUISITION EXPERTS

CLIENT ACQUISITION IN WEALTH MANAGEMENT™

PERSONAL EFFECTIVENESS: A FINANCIAL PROFESSIONAL'S SURVIVAL KIT

Business Challenge

Most financial professionals are smart, credentialed and well meaning. But not all have the insight or bandwidth to seize all opportunity all of the time. In fact, current client demands and compliance matters are taking valuable time away from prospecting and practice development. Often what's needed is a process for getting the right work done right.

The Focus

In this tools-driven program, financial professionals learn to create their Perfect Week, to adopt a *time-slot* strategy for their outreach, and take a "*Big 6*" approach to what's realistic to accomplish in one business day. This program allows for best practice share and peer coaching and helps financial professionals expand their idea of what can get done and when.

Key Content

- Debunking the multi-tasking myth
- Creating the perfect day and the perfect week
- 21-day personal growth commitments
- The Big 6 List – getting the right things done
- Doing what's "closest to the money" first
- The Clean 10 – keeping the office a place of productivity
- Improving your personal decisiveness

Outcomes

By participating in *Personal Effectiveness: A Financial Professional's Survival Kit™* participants will be able to:

- Craft a 21-day productivity improvement plan
- Understand their personal source of productivity
- Manage the four demands on their time: Clients, Prospects, Networking and Compliance
- Move quickly out of funks and procrastination
- Reduce the pressure they feel when there's so much to do
- Manage their energy, more than their time for personal success and renewal

WHO WILL BENEFIT

Personal Effectiveness: A Financial Professional's Survival Kit™ is designed for Financial Professionals and distribution executives that balance the often conflicting priorities of practice development, relationship management and compliance and administration. Perfect for advisors in need of greater productivity in their approach to practice growth.

DELIVERY

Personal Effectiveness: A Financial Professional's Survival Kit™ is delivered in two-hour and half-day formats. A perfect program for Value Added teams in the fund and annuity space.

ABOUT

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