INTERACTIVE COMMUNICATIONS
ADVANCED SALES CLINICS

When a new producer comes on board, some things about the way you sell to them should change and some shouldn't. Mastering this strategic component of managing advisor relationships over time makes all the difference.

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MANAGING RELATIONSHIPS OVER TIME

Pre-Work: Participants compile profiles of three advisor relationships that they are involved with and want to work on during the clinic.

Agenda (half day):

- Tactics versus strategy.
  You need more than core sales skills to work with advisors over time.
- Relationship objectives.
  Not all relationships are created equal.
- Relationship stages and drivers.
  Where are you in you advisor relationships and how are you going to move them to the next level?
- Re-profiling
  Including asking the tough questions (again).
- Asking for more business.
  How soon is too soon and when is it too late?
- Relationship risks.
  Red flags that might indicate a problem, even if you're still having good conversations with them.

Reinforcement: : In the three weeks following the training session, participants receive a series of three emails with additional insights into managing relationships over time.

About Interactive Communications

Interactive Communications was founded in 1994 by Mary Anne Doggett and Claudia Fogelin, two sales thought leaders who each have more than 25 years experience in financial services and asset management. Concentrating exclusively on firms that sell through financial intermediaries, our mission is simple: We help you sell more.