



# INTERACTIVE COMMUNICATIONS ADVANCED SALES CLINICS

Advisor enthusiasm can be mistaken for urgency. Asking the right (and tough) questions helps ensure you don't end up in non-urgent radio silence. Once you have determined urgency, you can stay in touch without being a nudge.

## ASSESSING URGENCY AND FOLLOW UP

**Pre-Work:** Participants complete an online diagnostic with scenario-based examples that determine their current skill level in questioning and the use of touchpoints.

### Agenda (half day):

- The buyer's journey.  
*Just marketing jargon or an effective sales tool?*
- How to create urgency.  
*It's possible, but you have to know how.*
- What questions and when to ask.  
*Even the best questions backfire if it is the wrong time.*
- Relationship stages and drivers.  
*The reality check on "ya gotta stay in front of me."*
- Touchpoints.  
*Subtle ways to get the advisor to take action.*
- Re-profiling.  
*A lost art that makes a huge difference.*
- Best practice summary.  
*Taking advantage of the changing roles of the buyer and seller.*

**Reinforcement:** Participants complete an online quiz that uses a scenario from their business and asks them to assess the customer journey stage, and develop questions to create urgency and a touchpoint strategy.

### 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.

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