

2017 Clinics

Emails that Work

Email is the new outbound call. As more and more advisors indicate that they prefer email interactions over phone conversations, internals need to develop the skills necessary to engage both prospects and current producers in compliant email conversations.

How to Open an Outbound Call

The first few seconds of an outbound call are make or break. Even so, many internals open their calls in ways that undermine their credibility, make them sound like every other internal, and set them up for short, unsuccessful advisor interactions.

Presenting over the Phone

Phone-based presentations are not simply a slimmed-down version of face-to-face presentations. Internals need additional skills to keep advisors engaged and convey complex product information without the help of visual aids or a warm handshake.

Listening with the Intent to Understand

"Most people do not listen with the intent to understand; they listen with the intent to reply. They're either speaking or preparing to speak." Stephen R. Covey

Pre-empting and Managing Objections

The most effective way to manage objections is to pre-empt them. Not only does this establish trust and credibility, but also eliminates the need to 'overcome' them. You will practice this skill and perhaps even more powerful, recognized disguised objections. These skills make your job MUCH easier.

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The Art of the Close

Successful sales interactions always end with the advisor agreeing to take a next step, or if you prefer, a close. In a relationship, this close is often something other than “use this product right now” and never “I’ll give you a call in a couple of weeks.”

Stuck Sales

A new sales opportunity comes in. It’s big and shiny and the advisor wants what you have. At first conversations go well, but then the sale starts to slow down and the sense of urgency fades away. Eventually, the sale stalls altogether and the advisor goes to radio silence.

Assessing Urgency and Follow Up

Your sense of urgency is a lot higher than that of the advisor, but the last thing you want is to sound desperate. How do you determine whether the advisor is just shopping, in the store or close to buying? What’s the best way to follow up (and when)?

Managing Relationships Over Time

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

Pipelines You Can Count On

If your pipeline reflects some wishing and hoping, you may be tempted to think a long sales cycle is not unusual. Remember the 7-touch rule? That may be true for very high-end RIAs. For the rest of your advisors, you may never get 7 touches before radio silence kicks in. This clinic helps you know exactly where you are with real opportunities and specifically what you need to do to close.

2017 Clinics (cont.)

Managing Your Day

The best internals and hybrids have this down to a science. Those who don't you may find themselves on the road to failure. The process sounds easy but how do you make it a habit? What are some best practices to insure you get more done than your colleagues with less effort?

Sales Desk Managers and Metrics

Measuring internal wholesaler performance is a top priority senior managers and one they often find difficult to get their arms around. In addition to counting activities, metrics need to include quality. To be effective, the definition of good needs to go way beyond that fuzzy 'moved the sale forward', or 'discussed a product' (which almost always means a pitch that may or may not be appropriate). This clinic helps sales desk managers define and implement the quality element that internals and hybrids will need to master to be successful going forward.

