

Clients for Life

Customized sales training for financial professionals

Wynn Solutions presents a customized sales training workshop that combines two years of research from the top 2% of the financial industry with general best practices to create a proven relationship selling approach.

Suggested Agenda

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Sales Training Workshop

Key Objectives

Emulate the practices of the most successful people in the financial industry

Become consistently chosen as the trusted advisor

Increase marketing impact and brand differentiation

Improve presentation skills

Structure client expectations

Characteristics of the top 2%

Managing expectations and emotions: Delivering bad news effectively

Structuring your clients expectations

Elevating your positioning: Developing your insights

Effective relationships with your clients other key advisors

Building relationships with your clients beneficiaries

The benefits of building a fee based business

The client survey: Finding out what you do best

Being a one-stop-shop

Restoring relationships with disappointed clients

Being the best vs. being consistently chosen

Making people wrong: Are you being effective?

Dropping your judgments

How detectible is your compassion in the first meeting?

Proving integrity and stability

Will doing business with you make your client look good to others?

Do your clients really know what you are talking about?

The truth about trust: Honesty and wisdom

Difficult personalities and people who have them

Sustaining a marketing and branding process

Pre-platform marketing (branding):
Core concepts and critical beliefs

Leveraging your existing relationships

Prioritizing clients in order of referral production: Getting more from your top 20

The ten best reasons to call your clients when you have nothing to say

Setting appointments: Customized call processes

Preventing relationship deterioration: What's important?

Marketing your seminars and speaking engagements

Listening like the trusted advisor

Listening problems: Do clients feel heard or endured?

How to avoid robbing people of their uniqueness

Neurological facts: The pituitary-gland advantage

Letting them talk

Effective responses

The truth about body language and voice tone

From prospect to client

Customizing a client care process: Client-focused systems

Prospecting basics: From marketing to prospect

The goal of the first meeting is to get a second meeting

The most effective questions of the top 2%: In-depth profiling

Overcoming fee issues

Gaining agreement: Painless closes for concerned investors

Presentations are only as good as the presenter

Identifying your strengths and weaknesses

Improving your presence: Being good in front of an audience

Putting passion in your presentation

Preparation and positioning: Knowing your audience

Creating presentations with impact: Attracting wealthy clients

Separating yourself from the competition