

Sales Training for Financial Advisors

Wynn Solutions' training programs are not based on unproven theory or the success of just a few phenomenal producers. Our recent three-year research project—an in-depth survey of top producers in 24 firms, including wire houses, independents, and the bank channel—on what the most successful financial advisors actually do from day to day reveals beyond-best practices that build and leverage relationships while turning talent into performance.

The sessions below are available in one- and two-day versions and can be customized to your group's specific needs.

Clients for Life: Selling Financial Advisory Services

- ▶ Goal setting, time control, and work ethic: Vision, action, and values
- ▶ Prospecting: Leveraging relationships and getting referrals
- ▶ How to turn the first meeting into a second meeting: Profiling
- ▶ Honing your prospect-to-client process
- ▶ The art of gaining agreement: How top producers close the deal
- ▶ From knowledge to implementation: Doing it your way

Being the Best vs. Being Consistently Chosen: The Truth about Success

- ▶ There is more to success than being the best
- ▶ The truth about success: Getting better at what you do well
- ▶ The truth about trust: Listening like the trusted advisor
- ▶ Effectively managing expectations and emotions
- ▶ Surviving the blame: Building and maintaining relationships in tough times
- ▶ Developing and maintaining your client-care system

Beyond-Best Practices: Implementation of the Top Producers' Survey

- ▶ Aligning your goals with your talents: Success in action
- ▶ How to clearly explain the value of your service
- ▶ Simplifying your organizational processes
- ▶ How to stay persistent with clearly defined outcomes
- ▶ How to manage your relationship-building time with top clients
- ▶ How to leverage relationships by being a solutions provider
- ▶ How to conduct client surveys and focus your offerings

Client Testimonials

Rave reviews would be an understatement. You are one of the best speakers we have ever had at Smith Barney. I really appreciate your preprogram research and funny, to-the-point delivery. Let's try to match schedules for multiple dates next year. Thank you for all that you did for us. **Frank P. Breazeale III, Regional Sales and Training Officer, Smith Barney**

Great job! You have helped us to better explain the value of our services, streamline our processes and define the specific talents needed to hire the right people. Your insight into what is really important about our business has positioned us to do more of what we do well and has increased our revenues. **George Cohlma, Senior Vice President—Investments, Prudential Financial**

Garrison, your sales training program was the best I have seen in my eight years with CUNA Mutual. My people are still talking about it a year later and are successfully using your strategies. Your session was funny, direct, and very well researched. Your approach—knowing the specific issues we have to deal with, providing the answers, and making us laugh along the way—is exactly what we needed. I intend to bring you back for another training session and will touch base with you soon. **John Ridge, DMMFS, CUNA Mutual Group**

We have used Garrison 15 times already this year, with terrific results. His funny, interactive approach keeps the group focused, and his "dealing with difficult people" segment, among others, was particularly effective. Garrison helps us provide excellent value-added training to our customers. **Joe Sprague, Director of Key Accounts, AIM Management's Financial Institution Division**

Garrison was able to help me eliminate roadblocks and become more effective, fast! I have had a 100% increase in referral business, a 50% increase in revenue, and a 30% increase in productivity. Thanks, Garrison. **Robert Gilliland, Vice President—Investment Financial Service, Smith Barney**

Your tips on how to make the most of difficult client relationships will help all of our people. **Chris Murtha, VP Marketing/Business Development, TD Waterhouse**

Your sales presentation was outstanding; I would recommend you to any company that wants to motivate and educate employees and independent contractors. Thanks for making me look good! **Robert Bohli, Field Vice President, American Express Financial Advisors**

Your ability to deliver strong customized content and to be so funny at the same time is unmatched. We have received excellent feedback for the 20+ programs you have delivered at conventions across the country. **AIM Management**

Thank you for the great training workshop you provided for the sales team. The tools you taught us have made us more effective in opening relationships with our customers. Your recommendation to conduct a major training program with quarterly booster shots has proven to be the boost we needed. We are exceeding our goals! **Banco Popular**