

PROGRAM OVERVIEW

Core: 80/20 Internal Wholesaling



This two-day program was developed from the premise that the inside wholesalers must have a business model from which they work. Our goal is to provide the framework for that model and the opportunity for each participant to develop and refine their effort. The key processes within our framework include Target Marketing, Territory Management and their application within the Sequoia Sales Process.

Target Marketing concerns itself with client segmentation, determining specific criteria for top prospects and clients and defining successful relationships. The benefit to this segment is the participant's ability to allocate time more effectively.

Territory Management addresses call planning processes, business planning processes, tools for gathering field intelligence, leveraging activities with field wholesalers and working with their team. The benefit to this segment is the participant's ability to understand the rhythm of a day in an effort to manage their time more effectively. Participants also identify strategies to use with field wholesaler that enhance the effectiveness of the internal/external partnership.

The Sales Process breaks down successful selling into four components. Information Gathering includes understanding the advisors mindset, defining the call objective, opening the call or getting the right start, and the information exchange. The Value Proposition includes the positioning of the company, the products and a special emphasis on the individual/participant. Action Steps are then defined to advance the relationship forward with an advisor. And finally, Closing Skills are discussed to help participants understand how to achieve a commitment, not just an agreement.

Expected Outcomes

- **Better results.** Although many factors are responsible for success, Sequoia training will clearly play a role in delivering more effective, more efficient sales professionals delivering better results.
- **Stronger relationships.** Your internal sales professionals will enjoy stronger, more productive business relationships with their clients as a result of executing the systems and tools that we share with them.
- **Clear Focus / Reduced Downtime.** Internal sales professionals are provided a tested and proven blueprint for managing their responsibilities and geographies while implementing a proven sales process.

PROGRAM AGENDA

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Program Agenda-Day One

8:00 am–5:00 pm

First Thoughts

- Core Competencies
- Sequoia Foundations and Beliefs
- Sales Process Overview

Target Marketing

- Segmenting Advisors and Prospects
- Identifying Top Prospects
- Ideal Advisor Profile
- Prepared Interview Questions
- Interviewing Best Practices

Territory Management

- Allocating Your Time
- Defining Call Rotations and Zone Coverage

Day One Finish

- Recap

Program Agenda-Day Two

8:00 am–3:00 pm

Second Thoughts

- Day Two Overview

Territory Management (Cont.)

- Scheduling Best Practices
- Structure of a Day / Week / Month

Communicating Your Value Proposition

- Company, Product and Self Profile
- Positioning Statements
- Personal Value Proposition
- Call Objectives, Activities and Events Inventory
- Developing Call Objectives
- Prepared Talking Points

Program Finish

- Takeaways
- Priorities and Next Steps