

## PROGRAM OVERVIEW

# Sequoia 80/20 Core Skills



Sales professionals are taught to focus on those few things that are known to produce the greatest results. “Pareto’s Law” or the “80/20 Principle” is a time proven method for determining the essential few. Core Skills adapts time-proven principles to best practices for sales success.

The key processes within our framework include **Target Marketing** and **Territory Management**. Target Marketing concerns itself with client segmentation, identifying opportunities, determining specific criteria for top prospects and clients and allocating time more effectively. Territory Management delves thoroughly into issues such as business planning and goal setting, developing and refining zones, scheduling appointments, fiscal management, working as a team and a new way to measure success daily.

On-point discussion, group exercise and Sequoia tools are frequently employed to enhance the participant’s ability to carry the skills into their daily practice. Among the topics covered during the program are:

- Sequoia Foundations and Great Truths in Distribution
- Segmenting Clients: Understanding the “Factor”
- Identifying Top Prospects
- Time Allocation
- Defining Levels of Service
- Business Planning and Goal Setting
- Zone Coverage and Scheduling
- Work as a Team
- Daily Point System for Measuring Success

## PROGRAM AGENDA

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### Program Agenda–Day One

8:00 am–5:00 pm

#### First Thoughts

- Program Objectives & Agenda
- Great Truths
- Sequoia Foundations

#### The Target Marketing Process

- Segmenting Your Existing Clients
- Ideal Advisor Profile
- Ranking Prospects
- The Time Bank
- The Value of Your Time
- Defining Levels of Service
- 80 / 20 Fiscal Management

#### Day One Conclusion

- Recap & Takeaways
- Evaluation

### Program Agenda–Day Two

8:00 am–3:00 pm

#### Second Thoughts

- Objectives & Program Agenda

#### The Territory Management Process

- Business Planning and Goal Setting
- Zone Development and Analysis
- Scheduling Best Practices
- Working With Your Team
- The Sequoia Daily Point System

#### The Sequoia Sales Process

- An Introduction

#### Program Finish

- Recap & Takeaways
- Forward Steps
- Evaluation