

## FINANCIAL SERVICES

### THE 90-DAY DASH™ | THE DRIVE FOR QUALIFIED NEW RELATIONSHIPS

#### Business Challenge

Financial professionals are bombarded by calls from wholesalers. Many have assistants screening their email and they rarely pick up the phone for anyone other than their clients. In fact, over 90% of voicemails never get returned. Distribution representatives (and the advisors they serve) need an easy to execute a process for generating qualified new relationships – one that cuts through the clutter and makes them and their firm stand out over time.

#### The Focus

The **90-Day Dash™** is a 90-day development process designed to help distribution salespeople systematically grow their business. The program is driven through a high-impact seminar with 90-days of follow-on coaching. This results-producing system provides wholesalers and account reps at all levels with practical skills and tools that they'll be able to use immediately. Coaching and reinforcement is a key factor in the program's success and is conducted through ProDirect's Online Learning Center.

#### Key Content

- Developing Your 7-Touch Strategy™
- Creating a "stream of consciousness" with prospects
- Developing your unique elevator pitch
- Referral strategies that generate qualified new relationships
- Personal time and opportunity management strategies
- The **90-Day Dash™** business development dashboard
- Prioritizing your prospects for maximum penetration
- The ProDirect relationship building tool

#### Outcomes

By participating in The **90-Day Dash™**, participants will be able to:

- Generate a minimum 20% increase in qualified new relationships
- Determine where exactly to go for new business
- Create more compelling relationships with their network
- Engage the total organization beyond their team
- Attract and recruit advisors vs. merely "selling" them
- Develop a plan of touches that brands them as a trusted advisor



#### WHO WILL BENEFIT

The **90-Day Dash™** is perfect for wholesalers, account managers, and service desk personnel in product distribution roles who need to reach high-value, hard-to-get financial professionals to grow their business.

#### DELIVERY

ProDirect's **90-day Dash™** is a 3-month intensive business development program that kicks off with an engaging 4-hour seminar complete with tools and tip sheets. Follow-up coaching is provided by trained ProDirect facilitators and/or certified client coaches. The **90-day Dash™** is also the perfect value added tool to bring to financial intermediaries looking to grow their business.

#### ABOUT

Founded in 1999, ProDirect LLC is a sales training and coaching company dedicated to helping companies leverage their sales talent. The firm blends sales training, business development tools, and real world coaching to help clients achieve results they can feel. Based in Princeton, NJ, ProDirect serves clients in the Global 2000.