

FINANCIAL SERVICES

NEVER MAKE A COLD CALL AGAIN™

Business Challenge

Data shows that high-value financial professionals receive 120-190 interruptions per day. Throw in an endless flow of emails and a practice to run and it's next to impossible to get to a busy advisor. Even if you're lucky to get a senior decision maker on the phone, you've got to connect to the top 5-6 center-of-plate issues in their world. Wholesalers must rapidly build credibility to keep prospects participating in the dialogue over the phone.

The Focus

ProDirect works with wholesalers and their teams to do away with the stressful, low-value cold call to deliver articulated and unique value over the phone. **Never Make a Cold Call Again™** provides wholesalers a system to develop effective penetration and conversation strategies based on what busy FAs value. This program helps distribution executives strategically prospect for, advance, and close sales as well as book appointments that lead to greater opportunity.

Key Content

- Anticipating ways to create unique value and add professional insight over the phone
- Proven process for opening sales calls, ensuring positive first impressions, and transitioning inbound and outbound calls to opportunities
- A 7-touch strategy for creating awareness and piquing interest among FAs
- Selling appointments vs. selling products
- Shaping attitudes, beliefs and thoughts about telephone selling
- Live dial clinic to test and refine effective phone approaches with advisors

Outcomes

By participating in **Never Make a Cold Call Again™** participants will be able to:

- Set more appointments, fill sales pipelines and improve close ratios
- Transition advisor dialogues into positive action
- Improve listening and questioning skills
- Address prospect objections with credibility and poise
- Learn proven closing techniques that gain commitment from advisors to take action



WHO WILL BENEFIT

Never Make a Cold Call Again™ is for distribution executives in financial services that need to create a commitment to action over the phone. Perfect for inside sales desks as well as wholesalers needing to kick start the sales process with advisors and prospects.

DELIVERY

Delivered in 1-Day workshop or in 2 half-day modules, the program is complemented by a 90-day reinforcement process focused on live prospecting challenges.

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.