

## FINANCIAL SERVICES

### SALES MANAGEMENT FORUM

#### Business Challenge

Sales Managers in the asset management space are finding themselves in the midst of a paradox with their teams; the need to provide broad scale territory coverage with the need to build deep and meaningful relationships with advisors. These leaders know it's important to develop their people, but they're under pressure to grow assets now. Charged with squeezing every last dollar out of the pipeline to stay competitive, sales managers must have easy-to-execute visibility into the talent on their teams to ensure the full value from every opportunity.

#### The Focus

The **Sales Management Forum™** is designed to help sales leaders in financial services better manage the sales talent on their teams. Sales leaders learn to maximize the productivity and overall effectiveness of their external and internal representatives while fostering a self-managed high performance culture. The Forum focuses on the need to support wholesalers (and those who serve them) uniquely through all stages of the sales process. Participants learn that what they say is not half as important as when they say it. Four sales management disciplines are introduced: The Enabler, The Business Manager, The Visionary, and The Expert.

#### Key Content

- Managing through a validated sales process
- Understanding the individual needs and motivations of all levels of sales talent
- Creating a sales performance and career management bond
- Setting performance objectives and coaching for goal attainment using score cards and pipeline tools
- Giving and receiving sales performance feedback
- Coaching wholesalers through a dynamic pipeline process

#### Outcomes

By participating in the **Sales Management Forum™** participants will be able to:

- Achieve sales targets more consistently
- Create a more compelling relationship with wholesalers and distribution partners
- Engage the total organization beyond Sales
- Recruit, train, and retain the best sales talent
- Field a sales team that is an extension of the brand



#### WHO WILL BENEFIT

The ProDirect **Sales Management Forum™** is for senior sales leaders in financial services looking to get more from their people and their organization. Perfect for those in distribution organizations who manage wholesalers and those that support them across all levels of their sales talent spectrum.

#### DELIVERY

Delivered in a 1-Day session with optional follow-on coaching

#### 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.