

Building A Successful Financial Planning Practice

Lesson Plan

Day 1: Customer Acquisition Strategies -

Build a reservoir of highly profitable customers

Duration: 9.30 am to 5.30 pm

Customer Acquisition Strategies is a complete, step by step sales and business development process. It shows you the mindset, sales strategies and techniques needed to identify high quality prospects for your business easily and consistently WITHOUT the need to make cold calls.

The most successful sales efforts are based on strategy. Strategic prospecting is maximizing your resources — using your resources to the very best advantage in order to position yourself favorably amongst the most qualified prospects.

This program will help you to identify your most profitable prospects, where to locate them and the most effective strategies for reaching out and connecting with them. We will also be exploring several online and offline prospecting strategies.

By the end of this course, you will be able to build a reservoir of highly profitable customers at the least cost and with the highest possible profit.

Upon the completion of this course, you will

1. be able to cultivate a resilient attitude towards prospecting
2. be able to formulate a strategy to focus on high quality prospects who are ready to buy
3. be able to acquire loads of warm qualified prospects for your business
4. be able to establish trust and connect with the customer within a short period of time
5. be able to organize a system to keep track of every prospect
6. be able to work at a comfortable pace to achieve your sales and income goals
7. adopt successful prospecting habits that will increase your effectiveness significantly

... and learn many more ideas and strategies

Learning Methodology

1. Presentation/Lecture
2. Group discussions
3. Memorizing of scripts
4. Role plays
5. Brainstorm sessions
6. Applications exercises
7. Action commitment

Day 2: Email Automation for Success -

How to reach out to thousands of customers easily and effortlessly

Duration: 9.30 am to 5.30 pm

Email Automation is the process of building relationships and keeping in touch with qualified customers in a timely manner using automated emails.

As your business practice grows, the number of customers to keep in touch and follow up with increases. The ability to maintain a consistent yet unobtrusive presence will be paramount in determining who gets the next sale when the client is ready to buy.

Email Automation automates the process of customer communication; thereby freeing up your time to focus on other critical aspects of the business.

Upon the completion of this course, you will be able to:

1. Get loads of warm qualified leads for your business
2. Have an organized database to manage all your prospects, customers and orphan policyholders
3. Reach out to all or specific segments of your customers easily and effortlessly
4. Send birthday and festive greetings, reminders, educational and product information automatically
5. Gain insights into customer preferences and behaviour

Learning Methodology

1. Presentation/Lecture
2. Group discussions
3. Memorizing of scripts
4. Role plays
5. Brainstorm sessions
6. Applications exercises
7. Action commitment

Day 3: Financial Planning Presentations That Sell –

How to identify the customer's needs and close the sale within 20 mins

Duration: 9.30 am to 5.30 pm

Top financial advisors find that the most effective approach in financial planning is the consultative approach. Rather than communicating with customers in the capacity of a "salesperson," top financial advisors serve as consultants; helping their customers maximize their savings, manage risk and ultimately achieve their financial objectives.

The purpose of this program is to explain the consultative approach by reviewing the key methodologies and strategies, the steps of the consultative process, and how it addresses and connects with the basic needs of all customers.

Upon the completion of this course, you will be:

1. Able to establish trust and connect with the customer within a short period of time
2. Able to identify the hot buttons of the customer easily
3. Able to elicit the emotions of the customer and understand their financial concerns
4. Remove the customer's number one fear that stops him or her from saying "YES".
5. Able to translate features into customer's benefits or solutions
6. Able to sell results or solutions, rather than products or service
7. Able to find measurable ways to increase profitability for your clients

Learning Methodology

1. Presentation/Lecture
2. Group discussions
3. Memorizing of scripts
4. Role plays
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6. Applications exercises
7. Action commitment