



INTERACTIVE COMMUNICATIONS RESULTS™ 2023 SALES TRAINING

It's no secret that advisors are changing and that what worked in the past is no longer enough.

To succeed today, internal wholesalers need a set of elite sales skills that help them create an experience advisors value.

And they need a roadmap to delivering that kind of experience.

That's what RESULTS™ 2023 Sales Training is all about.

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PROGRAM OVERVIEW

RESULTS™ 2023 Sales Training is Interactive Communications' core sales training program for internal wholesalers. Designed to help them put in place the sales process they need to bring in and retain assets today, it also gives internals a solid foundation for advanced sales skill development.

More than just a workshop, the program combines one or more days of live training with an online pre-work diagnostic and participant reinforcement. We customize the entire program to the client's products and business priorities. Support for the sales desk management team is also an integral part of the program.

Because the needs and preferences of advisors frequently change, we update the program every year. That's why it's called RESULTS™ 2023 Sales Training.

TRAINING OBJECTIVES

RESULTS™ 2023 Sales Training , helps internal wholesalers learn to:

- **R**esearch and prepare so they can personalize the conversation to the advisor's situation.
- **E**ngage the advisor in a way that gets their attention and encourages conversation.
- **S**ize up the situation by asking questions and employing other linguistic techniques.
- **U**se benefits as well as features to let advisors understand what's in it for them.
- **L**ay concerns to rest by recognizing and even preventing objections.
- **T**ie down next steps by establishing who will do what by when (especially the advisor).
- **S**et up future conversations with effective CRM input and prep for the next conversation.



RESULTS™ 2023 SALES TRAINING IS DIFFERENT

Sales training for internal wholesalers is often a retrofit of a face-to-face program. Interactive Communications built RESULTS™ 2023 Sales Training from the bottom up specifically internal wholesalers and their phone- and web-based sales interactions. But that's not all. RESULTS™ 2023 Sales Training is different because it:

- Reflects the realities of selling to today's financial intermediaries and the growing role of internal wholesalers.
- Provides structure while at the same time allowing internals to maintain their own style.
- Emphasizes the sequence and transitions that internals need to master in order to better control the conversation.
- Goes beyond transactional, one-and-done selling and paves the way for building and maintaining long-term relationships.
- Includes proven linguistic techniques that help internals connect with the intermediary at the psychological level.

And finally, it works and it lasts. Internals who use the RESULTS™ 2023 process measurably increase their impact on territory sales.

About Interactive Communications

Interactive Communications was founded in 1994 by Mary Anne Doggett and Claudia Fogelin, two sales thought leaders who each have more than 25 years experience in financial services and asset management. Concentrating exclusively on firms that sell through financial intermediaries, our mission is simple: We help you sell more.

We do this by providing sales training, coaching, and consulting to help increase sales, retain talent, and capture today's opportunities, while at the same time staying ahead of industry trends. With our deep knowledge of intermediary distribution and how it is changing, our customized services enable clients to bring in sales sooner, deepen relationships, and avoid costly mistakes.

Interactive Communications works with asset managers, banks, insurance companies, and other financial services companies. Our clients range from industry giants to up-and-coming boutiques. We work with wholesalers – external, internal, and hybrid – as well as institutional sales, national accounts, and retirement specialists.

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