Trustworthy Selling Modularized Version –

Module and Description:	**For Wholesalers**	**For Contact Center Sales**
Understanding Today's Consumer Sales professionals will: • Leverage cutting-edge LIMRA research to deeply understand consumer behavior in the marketplace • Develop skills needed to establish trust and significantly reduce consumer procrastination • Be empowered to help their consumers align their actions with their intensions Learn More	Great foundational module for Wholesalers that will be working directly with an advisor's prospects and clients – helps Wholesalers understand what motivates today's consumer and Behavioral economic principles they may be experiencing that may inhibit the sales process.	Great foundational module for Contact Center representatives (CCRs) when working directly with prospects and clients on the phone. This content helps CCRs learn and understand if their prospect or client is attempting to eliminate a pain or experience a gain by purchasing a financial product. Also, what motivates the prospect or client and identify a Behavioral economic principle they may be experiencing that may derail or inhibit the sales process.
Understanding and Adapting Your Selling Style Sales professionals will: • Receive personalized feedback on their selling style in a financial services sales situation through our industry validated Personality Styles Profile (PSP) assessment • Learn about the different selling styles and how to address the diverse styles of consumers in the marketplace • Discover effective ways to adapt language, presentation skills, and more to connect with prospects and clients effectively Learn More	This is always a fun module of content. Everyone loves to learn a little bit about themselves, as well as understand more about the advisor, prospect, or client they may be interacting with. How someone prefers to be engaged with, in a financial sales situation, is key to building strong relationships and tailoring your approach to the sales conversation and process.	CCRs love this module of content. While a lot of indicators of style can only be observed in a face-to-face interaction, within this module we share strategies for identifying style in the virtual and verbal only environments. Plus, style in Trustworthy Selling is based on an individual's style preferences in a financial sales situation. Very different than overall personality style. People react and think differently when it comes to their finances and how they approach financial decisions. This module is a must for understanding style preferences and how to adapt your style to work more closely with your prospects and clients.
Business Development Strategies Sales professionals will: • Create effective strategies for identifying target markets and new business opportunities • Discover a variety of techniques, tools, and resources to successfully penetrate those markets, ensuring efforts are both targeted and impactful Learn More	For POS Wholesalers, this may not be an appropriate module of content. However, if the Wholesalers is looking to add value to the advisors' practices that they support, this module of content could be delivered by the Wholesaler to the advisor and their team to help develop and execute upon effective business development strategies.	This module is not appropriate for CCRs.

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Engagement Strategies Sales professionals: • Engage prospects effectively from the very first contact • Develop strategies to overcome consumers' preoccupations, motivating them to actively participate in the sales process Learn More	This module is not appropriate for Wholesalers.	This module is not appropriate for CCRs.
Collaborative Discovery Sales professionals will: • Learn about the art and science of effective questioning skills • Master the art of engaging in courageous conversations with prospects and clients through these effective questioning techniques • Learn about buyer needs, supporting them in tailoring their approach to meet their prospects and clients' expectations to drive successful outcomes Learn More	Wholesalers can benefit from this module of content if they are involved in POS meetings. Their ability to bring value to the discovery meeting through the questions asked can be a game changer when it comes to gaining commitment and making appropriate product recommendations.	This is an area of huge development for many CCRs. Asking good questions helps to foster learning and enhances communication between CCRs and their prospects and clients. Good questions also encourage critical thinking, ultimately leading to deeper understanding and better recommendations and solutions. This module focuses on the art and the sciences of questioning skills and teaches CCRs the value of ending fact finding meetings use the collaborative commitment process.
Gaining Commitment Sales professionals will: • Leverage effective strategies to support making product and solution recommendations and best practices for presenting solutions to their prospects and clients Learn More	Framing recommendations and effectively managing the solutions presentation of the sales process can help a Wholesaler bring huge value to an advisors practice. Tying recommendations to product advantages and benefits that address the prospect's needs solidifies the sale and ensures the right recommendations are being made to support the client's financial goals.	This module may be too advanced for CCRs.

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Deepening the Client Relationships Sales professionals will: • Learn effective strategies to continuously develop and strengthen existing client relationships through effective communication • Gain the skills to recognize and seize opportunities for cross-selling, enhancing the ability to provide comprehensive solutions to clients Learn More	For Wholesalers, they can learn a lot about how to mine an advisor's book of business to identify business opportunities for the products and services they represent. Also, understanding the segmentation strategy of an advisors book can help the Wholesaler know where their attention and focus can most be utilized to support the advisor grow their practice.	This module may be a good value add for CCRs that have been in their role for an extended period of time (1 year or more) and are looking to adopt new strategies to engage existing clients and identify additional opportunities to help them meet their financial goals.
Seller Psychology Sales professionals will: • Analyze personal mental toughness and develop a peak performance mentality based on best practices and experiences of top producers in our industry • Gain strategies to motivate and boost confidence, ensuring peak performance Learn More	While this module tends to be very sales advisor focused, elements of this module could be valuable to Wholesalers to understand seller psychology and how to help motivate and boost confidence to support peak performance with the advisors they work with.	This module is not appropriate for CCRs.