

# SALES STRATEGIES

## The Top Gun Program



### AGENDA ( TENTATIVE )

## Philosophy and Principles of Top Guns

### I. OVERVIEW

- a. Why Table Bay?
- b. Objectives of the course
- c. Top Gun Philosophy and Principles
- d. Meet the Enemy
- e. Get the Power to Tame the Volatile Sales Cycle
- f. Participant Introductions
- g. Two- Minute presentations
- h. SWOT Analysis

### II. WHY CUSTOMERS DO WHAT THEY DO/ What Customers Love

- a. Understanding Demographics
- b. The Baby Boomers ( Likes and Dislikes)
- c. Who they are
- d. Pain vs. Gain
- e. Why they buy
- f. How you can anticipate their every move
- g. WIIFM
- h. Power of Consequences
- i. TOD
- j. Relative Deprivation
- k. The Impact on you of an aging population  
- taking advantage of trends
- l. Demographics and The Stock Market
- m. Greed; Fear; Regret
- n. The Math of Risk
- o. Finding Information about your area
  - i. Google
  - ii. Fund Race
- n. The American Retirement Crisis
- o. The Outlook

### III. TRADITIONAL SALES SYSTEMS V. ANTI-TRADITIONAL

- a. The Sales Barrier
- b. The Sale is Defined by the Customer: People don't like to be sold, they love to buy!
- c. Buyer Behaviors – why they buy...An answer that you need!
- d. Stop Selling Features and Benefits
- e. Nice Guys Finish Last – You must Destroy the Other Advisor First or They'll Destroy You
- f. Selling in the **RED ZONE**
- g. The Art of Storytelling
- h. Power Phrases

## Control Point #1

### IV. BRANDING YOURSELF TO ATTRACT IDEAL CLIENTS

- a. Stand Out From The Crowd
  - i. Get the Power to Differentiate Yourself in the Eye of the Consumer
  - ii. What is your value proposition (Specific; Unique?)
- b. Opportunity in a world of sameness
- c. The 17 Second Problem
- d. Differentiation in a Crowded Market – What's My Line?
- e. How to gain a competitive edge
- f. The Airline Intro – **what do you do?**
- g. Your clients think of you as the retirement planning expert. Now what?
- h. Specialization – Be an Expert
- i. Dress for Success – stop kidding yourself, it counts!
- j. Buzz Marketing – how to get people talking about you.
- k. The Art and Science of Branding
- l. Brand U
- m. Newsletters
- n. Strategic Alliances – How to have others help grow your practice
- o. Focus on entrepreneurial markets and forget the bureaucrats

### V. WHAT CLIENTS LOVE – A FIELD GUIDE TO GROWING YOUR BUSINESS

- a. What clients experience and expect
- b. The Starbucks Effect
- c. Forget About Yourself – Focus on Others!
- d. The prescription for long term revenue generating relationships
- e. The Checklist for Building an Exceptional Business

### VI. THE TABLE BAY ADVANTAGE MARKETING SYSTEM

- a. The Ultimate Marketing System
- b. 80 Million Reasons to Conquer The Baby Boomer Market
- c. Systems to Attract and Serve the greatest retirement market in history
- d. Your Best Lead Source
  - i. How to Best Leverage Your Book
  - ii. Segmenting the book
- e. Relationship Marketing
  - i. Promoting Referrals
  - ii. Developing Strategic Partners
  - iii. Old Prospects Campaign
  - iv. Key Client Introductions
  - v. Developing Contacts

# Top Gun Training Program

## AGENDA (TENTATIVE)

### Control Point #1 (continued)

- vi. Developing Your Connections
- f. The Ultimate Client Acquisition Program
  - i. Market Development v. Lead Generation
  - ii. Why Advisors fail to produce significant leads
  - iii. It will always be a numbers game
  - iv. Generating 2400 Sales Opportunities per Year
- g. The Campaign System
  - i. What is a campaign
  - ii. Campaign Versions
  - iii. Campaign Styles
  - iv. Running Your Campaign

### VII. TABLE BAY ADVANTAGE APPOINTMENT SETTING PROGRAM

- a. The Dynamics of Telephone Techniques
- b. Dialing for Appointments the Smart Way
- c. You Gotta WOW them
- d. Preparation for the call
- e. PPOs
- f. Gaining access to the right people – what to say
- g. The # 1 Goal of the Call

### Control Point #2

### VIII. THE CPA ADVANTAGE EDGE PROGRAM™ – STRATEGIC PARTNERING WITH CPAs

- a. The Secret to Sourcing New Affluent Clients
- b. Stop Sending Your Clients To Another Advisor
- c. Accessing the Private Wealth Market
- d. Accountants and Attorneys as Strategic Partners
- e. The Strategic Partnership Process
- f. The Law of Reciprocity

### IX. EFFECTIVELY UTILIZING CLIENT APPRECIATION EVENTS

- a. How a Party Can Improve Your Practice
- b. Profiling and Categorizing Your Book
- c. 1 Meal a Day with Clients
- d. Annual Reviews
- e. Who's The B.O.S.S.
- f. Appreciation Events and Special Events
- g. Gifts

### X. MARKETING MATERIALS AND TOOLS

- a. The Road To Success DVD
- b. Table Bay Digital Toolbox – CD ROM
- c. Table Bay Newsletters
- d. Table Bay Advantage One-on-One Coaching Program

### XI. COMMUNICATING YOUR VALUE PROPOSITION EFFECTIVELY

- a. Getting their attention – The “HOW” in WOW
- b. How to Effectively Open a Sales Interview
  - i. Table Bay Sales Interview Model
- c. Your Unique Selling Proposition

- d. Five Steps to Help You Master The Selling Dance
- e. The Magic Words – How to get what you want from the people who have what you need
- f. The Secret Language that will open doors everywhere
- g. Sales “Killers” and how to avoid them

### XII. Workshop

- a. Seminar in a Box
- b. The Power of Workshops
- c. The Seven Deadly Sins of Seminars
- d. Why we are successful when so many others fail
- e. Attracting the “Right” people to your workshops
- f. Education vs. Motivation

### XIII. Workshop LOGISTICS

- a. Location, Location, Location
- b. Restaurant and Staff Control
- c. You and Your Staff
- d. Working around and preventing the Seven Deadly Sins
- e. Planning and setting up your workshop
- f. Getting the Right People in the Seats
- g. Timeline – how it all works
- h. Using staff effectively
- i. Professional Presenters
- j. Using Outside “Experts”
- k. Workshop Day
  - i. Getting there and being prepared
  - ii. What you do all day
  - iii. Crowd Control
    - 1. Follow up – The key to success

### XIV. CUSTOMIZING YOUR WORKSHOP – THE WORKSHOP PLAN

- a. Research to Discover New Opportunities
- b. Selecting the best segments and niches for you
- c. Simplify for Growth
- d. How to set New Goals
- e. Package Yourself for Success

### Control Point #3

### XVI. MARKETING SOLUTIONS FOR FINANCIAL PROFESSIONALS

- a. The Pyramid Sale
- b. The Income Sale
- c. Stretch IRA/Multi-Generational Sale
- d. SPL
- e. Annuity Rescue Program

### XVII. SALES CONCEPTS AND WINNING SALES STRATEGIES

- a. The Power of Facts
- b. The Power of Three
- c. Storms on The Horizon
  - i. CNN Video
  - ii. The Long Winter Ahead
  - iii. The S Curve and The Coming Perfect Storm
- d. What if everything you thought you knew about investing was wrong?
- e. Storytelling for Financial Advisors
- f. Effective One Liners
- g. The Four Horsemen

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### Control Point #3 (continued)

- h. Multi-Generational IRA Sales – Creating a Lasting Legacy
- i. The Retirement Red Zone
- j. Turning Losses into Zeros
- k. Indexed Annuities
- l. Help minimize Taxes Though Net Unrealized Appreciation
- m. Fixed Annuities
- n. Life Sales Strategies
- o. Uncover Every Dime Your Prospect and Clients Own/Reading the 1040
- p. Funding the LTC sale with an annuity

### XVIII. THE PRESENTATION

- a. Understanding the audience
- b. Program Presentations – What do you want to communicate?
- c. Selecting the Presentation that works best for you
- d. Utilizing Technology

### XIX. PRESENTING

- a. **In The Seminar Setting – Stand Up Skills**
  - i. The Power of The Good Presentation
  - ii. The Power of Three
  - iii. A Model for Organizing Sales Presentations
  - iv. Preparation and Rehearsal
  - v. Credibility Builders and Robbers ( **Video** )
  - vi. The Number One Credibility Robber ( **Exercise** )
  - vii. Visual Aid Usage ( **Set up and Skills Practice** )
  - viii. The Use of Professional Presenters
  - ix. Participant Five Minute Sales Presentations
- b. **One on One Interaction Skills – Using Structured Interviews**
  - i. Organizing Your Message
  - ii. Rehearsal
  - iii. Listening
  - iv. Nonverbal messages
  - v. Dealing with different types of communicators
  - vi. Putting it all together ( **Skills Practice** )

### XX. THE TABLE BAY ADVANTAGE INTERVIEW SYSTEM

- a. Perfect Phrases for Sales Calls, Interviews, Phones Calls
- b. The Forgotten Art of Asking Questions

### XXI. CLOSING and HANDLING OBJECTIONS

- a. Is this an Annuity?
- b. Aren't annuities expensive – Suzie Orman say's that they are bad
- c. I need Liquidity and don't want to tie up my money
- d. How to Effectively handle surrender charges
- e. Is this FDIC insured?
- f. As compared to what?
- g. Avoiding the vacuum

### XXII. POST SALES ACTIVITIES

- a. Sealing the deal
- b. Follow up letters
- c. Neutralizing the other advisor
- d. Don't Let Buyers Remorse Sink Your Sales

- e. Delivery Process

### XXIII. THE COMPASS SALES SYSTEM

- a. Overview of Compass
- b. How to position the interview
- c. The simple, no-pressure, no-nonsense selling system

### XXIV. THE TABLE BAY FINANCIAL SAFE MONEY SOLUTION™

- a. The Concept
- b. Blind Faith – Facts and Statistics
- c. The Ultimate Safe Money Guide and Solution
- d. The Table Bay Financial Safe Money Solution Presentation

### XXV. THE PRODUCT FOR THE NEXT GENERATION

- a. Income Series Product
- b. Table Bay Product Line
- c. LifeTime Pay
- d. Aviva Single Premium Life

### XXVI. TOP GUNS POSITION PRODUCT, THEY DON'T SPEAK PRODUCT

- a. Participant Sales Idea Presentations
- b. Only a Fool would talk product
- c. A Top Gun Positions Product
- d. Handling Product Objections
- e. Table Bay Key Products
- f. How to Sell Fixed Indexed Annuities
  - i. The Key Reasons people buy them
  - ii. Comparing them to other investments
  - iii. How did they do that
    - 1. Explaining the FIA the right way
  - iv. The Three Circles
  - v. Tic Tac Toe
  - vi. Using Technology
    - 1. Demonstrating How Crediting Methods Work

### XXVII. HOW TO BECOME A MILLION DOLLAR ( INCOME, THAT IS ) PRODUCER

- a. Twelve Principles of Sales Greatness
- b. Becoming a Rainmaker
- c. The Winning Monthly Plan
- d. The Six Steps you must take to change Your Paradigm
- e. Becoming a Millionaire Maker

### XXVIII. FINAL PARTICIPANT PRESENTATIONS ( FIVE MINUTE W/ VIDEO )

### XXIX. THE TOP GUN BUSINESS MODEL – FOR HIGH PERFORMANCE

- a. A Model for Exceptional Performance
- b. The Numbers Game Exercise
- c. Characteristics of PEAK Performers – A View from the Top
- d. Becoming a Table Bay Top Gun – what it means and what it takes
- e. Getting Certified – The Table Bay Annuity Certification Plan
- f. The Table Bay FIA Certification Test
- g. Suitability Guidelines
- h. How to Avoid Compliance Problems When Selling to Boomers

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## AGENDA ( T E N T A T I V E )

### XXX. PUTTING IT ALL TOGETHER – THE TACTICAL MARKETING PLAN

- a. To Have, or Not Have a Business Plan/  
Tactical Marketing Plan
- b. Slicing and Dicing the Client Base

### XXXI. SHORTENING THE CYCLE TO SUCCESS

- a. The Personal Paradigm Shift- What it  
Takes to Transform Your Sales
- b. Breaking All The Dishonest Rules in Business
- c. The Three Things You Control
- d. Feed the Pipeline or Die
- e. Focusing on what you do best!
- f. Be a Gorilla or be a Guerrilla
- g. New Thoughts on Time
- h. A new way of thinking, communicating, and performing
- i. The Ceiling of Complexity and Techniques to Breakthrough
- j. Increasing your average sales four fold
- k. Dealing with Future Based or Past Based Clients
- l. The R-Factor Question
- m. Firing the ankle biters
- n. Keeping the Pipe Full – There is nothing more important
- o. Be Organized – Have a System
- p. Our Position, Philosophy, and Strategy