

## INTRODUCTION

Section 1 Certification Requirements  
Section 2 Certification “Tool Box”

## MODULE ONE

### **SELLING WITH THE PURPOSE OF HELPING**

Section 1 Following Our Preferred Way of Selling®  
Section 2 Building the Mental Toughness for Customer-Focused Selling  
Section 3 Selling to Each Customer’s Concept of Value  
Section 4 Identifying Each Customer’s Dominant Motivation

## MODULE TWO

### **CREATING CLEAR COMPETITIVE DIFFERENCE**

Section 1 Understanding How Customers Compare Us to Our Competitors  
Section 2 Describing How Our Solutions Are Clearly Different and Better  
Section 3 Creating a Unique Selling Proposition for Each Customer  
Section 4 Establishing Competitive Difference before Discussing Rates and Pricing

## MODULE THREE

### **ESTABLISHING TRUSTED ADVISOR CREDIBILITY**

Section 1 Making Good First Impressions  
Section 2 Gaining Interest Fast in Sales Conversations  
Section 3 Expanding Your Behavior Style Versatility  
Section 4 Adjusting to Each Customer’s Preferred Behavior Style  
Section 5 Making Effective Outbound Teleconsulting Calls

## MODULE FOUR

### **PROFILING CUSTOMERS FOR CURRENT AND EMERGING NEEDS**

Section 1 Identifying the Information You Need from Each Customer  
Section 2 Persuading Customers to share Information  
Section 3 Planning Your Questions for Specific Conversations  
Section 4 Identifying the Decision Influencers for Each Sale

## MAKING FIVE

### **COACHING CUSTOMERS TO MAKE GOOD FINANCIAL DECISIONS**

Section 1 Personalizing the Benefits of Your Ideas  
Section 2 Describing the Losses Customers are Experiencing  
Section 3 Making Recommendations as a Trusted Advisor  
Section 4 Coaching Customers with Your Questions  
Section 5 Providing Proof of Performance

## MODULE SIX

### **RESOLVING CONCERNS AND ADVANCING THE SALE**

Section 1 Anticipating and Preventing Likely Sales Resistance  
Section 2 Empathizing with Customer Concerns and Highlighting Our Strengths  
Section 3 Creating Urgency  
Section 4 Advancing Conversations to Next Step Action

## MODULE SEVEN

### **UPSELLING TO STRENGTHEN CUSTOMER RELATIONSHIPS**

Section 1 Screening Customers Early for Upselling Opportunities  
Section 2 Upselling Add-ons to Serve Customers Better  
Section 3 Organizing Your Sales Follow-up  
Section 4 Managing High Value Relationships

## MODULE EIGHT

### **PREPARING YOUR SALES GAME PLAN**

Section 1 Managing Your Sales Time  
Section 2 Practicing Your Response to Critical Selling Incidents  
Section 3 Preparing Your Game Plan for a Specific Sales Conversation