jmREIDgroup
targeted solutions

SELLING THE FULL FIRM

Learning Objectives

This hands-on two day workshop is designed to provide participants with the mindset, skills and tools to effectively sell the entire firm's capabilities.

By the end of this workshop participants will be able to:

- Assess the value of cross selling to various stakeholders
- Diagnose the missed opportunities within an existing client
- Identify the key selling principles necessary to cross sell
- Create a more strategic questioning strategy
- Demonstrate the skills necessary to effectively increase their cross selling performance through the use of existing tools
- Practice an approach in moving an existing client relationship to a cross sell opportunity
- Identify opportunities to challenge clients' thinking in order to impact their key business drivers
- Frame for participants how to engage in a senior level conversation
- Identify those accounts which merit a cross selling approach

PROGRAM FLOW

KEY CONTENT AREAS

Workshop Overview
- Introduction, Learning Objectives
- MAPS Activity
- Your Mindset Drives Your Impact

Strategic Gap
- Strategic Importance
- Diagnostic Scenario
- Value to Stakeholders

Principles of Cross Selling
- Self-Assessment and Implications
- Sales Resource Council

Genuine Curiosity
- Sanderson Murder Mystery
- Quasi vs. Genuine Curiosity
- High Gain Questions

Client Value Drivers
- Client Value Driver Model
- Diagramming Client Value Drivers
- Creating a Questioning Strategy

The Great Unknown
- Trust
- What to Say with Limited Knowledge

Positioning
- Tapper Listener
- Use of Jargon and Speaking in Threes

Existing Relationships
- We Teach People How to Treat Us
- Reframing the Relationship
- Trio Role Play
- Referrals and Advancing Relationships

Senior Level Conversations
- Conversation Gap
- Link to Value Drivers
- Conversation Framework

Account Selection
- Cross Selling in Not For Everyone
- Segmentation Criteria

Workshop Close