Strategic Wholesaler Training

A focused wholesaler and sales management training program designed to teach the strategy and tactics necessary to succeed in financial services today

Advanced Sales
Corporation
... ahead of the curve

You're in charge. Competition is stiff and you have an increased sales goal.

What's your plan to move your sales team to the next level?

Your team of experienced wholesalers has been through sales presentation training, advisor segmentation and business planning, and you have a plan. But…

Does the plan drawn from your intel and analysis address:

- Why your wholesalers are not capturing the attention of more advisors?
- The projected number of advisors a wholesaler will lose (loss ratio) each year and how to avoid it?
- Which of your top wholesalers have the greatest growth potential within an already saturated territory?
- How to achieve exponential growth instead of incremental growth in mid-tier to lower-tier territories?
- Which marketing activities tap the unique core competencies of your wholesalers to make them stand out from competitors?
- What the level of sales generated from A, B, C and D advisors reveal about a wholesaler's skill level and strategies that should be employed?
- Which current wholesaler territory rotations should be changed for maximum market penetration?
- How to apply an attainable, wholesaler-specific, logistically 'doable', market-focused, effective sales plan?

We Can Deliver All This for You and More.

Targeted To Maximize Your Team's Potential

Advanced Sales can help you understand your team's maximum potential and turn it into a reality. You know your wholesalers. However, **identifying all the intricacies that are preventing your team from achieving the next level of results can be difficult**. With Advanced Sales proprietary analysis and simulation tools, we can unveil these underlying factors territory by territory and help you address each of them head on.

We then **blend the science of sales with the art of sales persuasion** in order to show your wholesaling team how to get to the next level of success.

Strategy Fused with Execution

Advanced Sales Strategic Wholesaler Training is unlike other programs that simply tell your sales teams what they should do to be successful… we show you how. The **training is created and delivered by experienced people who have been there, on the front-line, talking to advisors**. We bring you an intensive, interactive program that blends strategic thinking with practical application.

Sales teams walk in with a sales goal and walk out with a blueprint detailing how to make it a reality.

Tailored to Your Company

Advanced Sales Corporation is the **only company that combines sales skills training with a client's proprietary product and value-added content to double the impact of a training program**. Our advanced training strategies for territory management and advisor-focused sales presentations blended with our technical expertise on product content make Strategic Wholesaler Training unique and effective. The program will teach your sales team how to deliver dynamic, actionable sales presentations to their target market. **Your team walks out of training ready to make an immediate impact.**

"If increasing wholesaler productivity is a goal for your organization, then Advanced Sales is definitely worth getting on your team. We were very impressed and pleased with the program they helped us install for our Internal and External sales force. These are people who truly understand our business and how to make it better".

Jeff Place
SVP - Head of Sales
WM Funds Distributor, Inc.

An Advanced Process Drives Strategic Wholesaler Training

Step 1: Discovery

Your product and sales needs are explored and vetted to discover your specific needs in relationship to your firm's sales goals and market share objectives.

Step 2: Analysis

Wholesaler sales and territory data are analyzed to identify sales trends, growth potential, firm advisor penetration and overall wholesaler effectiveness. Detailed reports may be further employed by management for additional wholesaler evaluations.

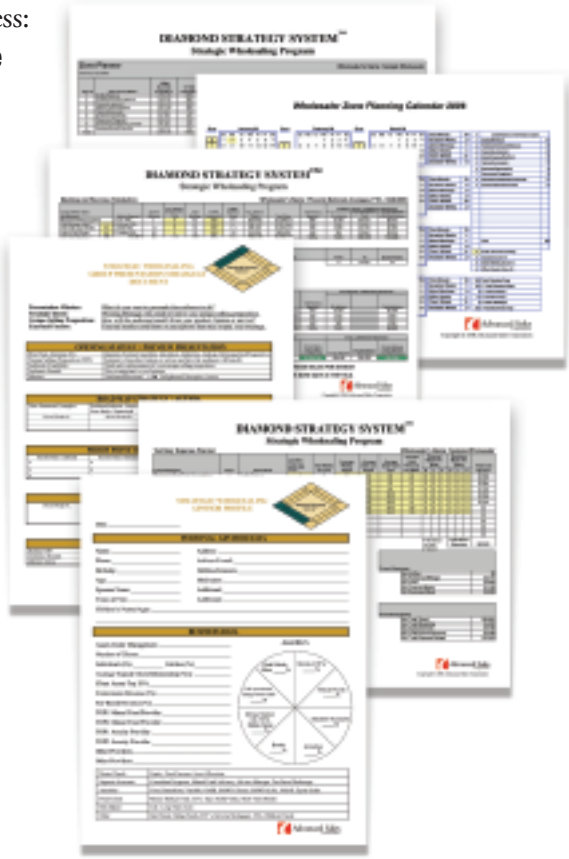
"Advanced Sales thoroughly wrapped themselves in our product and delivered a training program that taught and motivated our wholesalers. It was obvious from the delivery that Advanced Sales took the time to learn our business and address our needs. Our wholesalers will benefit from the experience."

Jack Sharry
Senior Vice President
Retirement Security
Phoenix Life Insurance Company, Inc.

Step 3: Training

Training addresses four core areas of wholesaler effectiveness:

- Target Marketing. **Identifies the optimal core of active advisors and prospects** and develops a sales and service delivery matrix.
- Territory Management. Proprietary simulation tools **analyze actual territory data to maximize meetings, control expenses and optimize territory rotations**.
- Advanced Presentation Skills. Show wholesalers how to **develop and deliver a story that differentiates their product(s) and services with maximum impact**.
- Advisor Focused Selling. Building effective advisor **relationships that promote action and drive sales**.



Step 4: Blueprint

Proprietary simulation tools **allow wholesalers to control variables and test assumptions** to determine the most effective sales plan based on their core competencies and territory specifics.

Sale Management Training

An advanced program for sales managers that provides the following:

- Interpretation and overview of Strategic Wholesaler Training data
- Additional data analysis for wholesaler evaluation
- Wholesaler coaching techniques

Program Logistics and Location

The day-and-a-half customized program is offered twice a month at one of two training facilities in Chicago, Illinois. A minimum of 10 and maximum of 20 participants per class is recommended. Classes should be scheduled at least 45 days in advance due to the customization required and date availability. Please call for more details.

Who Should Attend

The wholesaling program is designed for seasoned wholesalers with three or more years of industry experience. However, novice wholesalers will benefit greatly. Sales Managers are encouraged to attend this program along with an exclusive sales management session that deals with program coaching and unique sales management issues.

About Advanced Sales Corporation (ASC)

ASC is a leader in providing financial services companies with solutions to increase sales. From value-added program development to sales training, product marketing and seminar support, **we bridge the gap between sales and marketing from concept to execution**.

Each member of our staff has an extensive financial services background from leading mutual fund, annuity, wirehouse, banking, accounting and retirement plan companies. We have firsthand experience leading sales teams and developing marketing programs. We know your business, your products and your challenges. ASC understands your need for solutions right now.

With a passion for sales team excellence, ASC's programs increase your access to advisors, improve sales skills and solve territory management challenges. We offer a number of sales strategy and training programs with specifically-tailored solutions for each of your sales needs.

Start Turning Plans into Results

Let Advanced Sales bring your team to the next level of effectiveness and see the impact on your sales.

For more information on how Advanced Sales can help you, contact us at: (630) 990-1010

Other Programs:

- Advanced Markets Sales Concepts Training
- National Accounts Training
- Inside Sales Training
- Senior Sales Management Consulting
- Competitive Product Analysis
- Product Development
- Value-added Programs

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