



JBK Creative Solutions

Gain a fresh perspective

Sales Process

Group Benefits, Pension and Wellness

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El Dorado Hotel

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JBK Creative Solutions

www.jbksolutions.ca



Outline

1. Introduction
2. Effective prospecting
3. Pre-call planning
4. Identifying Buyers and motives
5. The decision process
6. Presenting to identified needs
7. Trial and assumptive closes
8. Overcoming objections
9. Questions/Follow Up



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Introduction

1. My previous positions
2. What I do now



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Pre-Call Planning

1. What is a pre-call plan?
2. Why is this important?
3. Are you allowing time?
4. Are you using all available tools



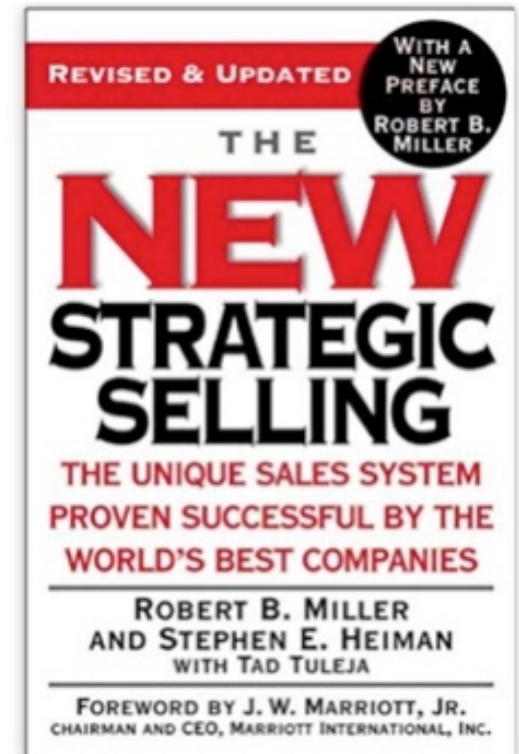
Buyers and Motives

1. Types of typical buyers
 - Economic Buyer
 - User Buyer
 - Technical Buyer
 - Coach
2. Different buyers...different motives
3. Critical step in the process
4. Honest conversations



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Decision Process

1. Process and time frame
2. Direct conversation
3. If not clear, follow up



Present to Needs

1. No canned presentations
2. Demonstrate Capri Insurance capacity and credibility
3. Focus on prospects stated needs
 - Restate need
 - Present solution (what this means to you is)
 - Trial close (does our solution address your need?)



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Trial and assumptive close

1. Use trial closes throughout the presentation
2. Tailor trial closes to different buyer motives
3. Decision maker present
4. If done well, asking for business should be a natural conclusion to the presentation



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Overcome objections

1. E.C.I.R.
 - Empathize
 - **Clarify**
 - Isolate
 - Respond



Questions/Follow Up

1. Questions
2. Follow up
 - Powerpoint posted to my website
 - Contact anytime for follow up over next few weeks
 - Interested in referrals



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