

Retirement Plan Sales Training Curriculum

DAY 1

Improve Your Retirement Sales Process

- Understand the numbers game
- Maximize productive activities
- Be alert to retirement plan industry time traps
- Using measurement to sell more

Activity: Document Process Insights for Your Practice

Efficient Retirement Plan Prospecting

- Targeting the right plan sponsors
- Building a proprietary prospect list
- Good and bad networking
- Reaching decision makers by plan size
- Prospect calls that drive action

Activity: Role Playing

Go Where Others Fear, Using ERISA & Regulatory Changes to Sell More

DAY 2

Moving An Inert Buyer

- Creating urgency
- Use technology to differentiate
- Breaking through the retirement plan industry clutter

Activity: Brainstorming advancement ideas for your practice

Closing Retirement Plan Business

- Formulate the right questions
- Showing (not telling) your unique value
- Moving past 'funds and fees'
- Getting the most out of your providers
- Driving decisions

Activity: Role Playing