



SALES COACH

Start with the Best

Mind-mapping exercises facilitate discussion

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Q: *We have started an internal board of advisors with some of the top agents in our office. Any ideas on how to leverage this group for all the parties involved?* —Dawn Wolfram, regional managing director, Principal Financial Group

A: What a great idea! I am a fan of anything top performers *get* to do, rather than *have* to do. The key is to make it meaningful for the top performers, the company and those who have not been asked to participate—yet.

Let's start with your top performers. I'll assume they are in a certain production bracket and/or have shown true leadership and wisdom in the office.

The first thing I would say is: "Let's pretend it is one year from now. For this investment of time and commitment to be extremely well spent, what specifically would have happened in your personal business because of your involvement in this group?"

Although this might appear to be a selfish question, I am reminded of some wise advice: You can't give what you don't have. If they are more successful, your regional office will be more successful, and they can give more to the folks who are not part of the group.

One way to facilitate this discussion can be through mind-mapping. All you need are some Post-it notes and a large wall. When someone comes up with an idea, have them write it on the Post-it note and apply to the wall.

Be sure they read what they wrote to spur further ideas. Once you get eight to 10 Post-it

improved service and pricing, they are much less likely to consider your competitor if they currently receive referrals from you. This is truly a way to differentiate yourself from your competition.

Another way is through recognition. Most of your clients are stroke-deprived. So when

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notes (ideas), you will begin to see trends. Go ahead and move the Post-it notes of similar themes together.

In the end, you'll likely have four to six branches or themes. With the end in mind, you can continue to brainstorm about time-bound goals and a plan of action to attain those goals. Best of luck to you.

Q: *While it's important to continuously prospect, what advice do you have for retaining clients as long as possible?* —Kevin Wahaus, CEO, Hickerson Wahaus

A: The key to retaining clients is not to take them for granted. So how about you surprise them from time to time? One way is through giving them referrals. When a competitor calls on your client with alleged

you read your favorite newspaper, business publication or lifestyle magazine and see their picture, let them know. I have found laminating their picture or article with a hand-written note pays big dividends.

My last idea has to do with customized follow-up. For those of you who have multiple children, have you ever told one child something twice and not the other child at all? This happens with our clients, too. Some of your clients need to hear from you on a monthly basis, to feel connected to you. Others might need to communicate with you only quarterly, semi-annually or even annually.

So what is the right frequency? It's whatever they tell you. By systematizing this follow-up process, you are less likely to over-service or under-service your clients, allowing you to work smarter. **KCB**