

Developing a ***Strategy*** and a ***Plan***
for how we grow our business



Being different, being strategic, having a plan ...



Or



With a

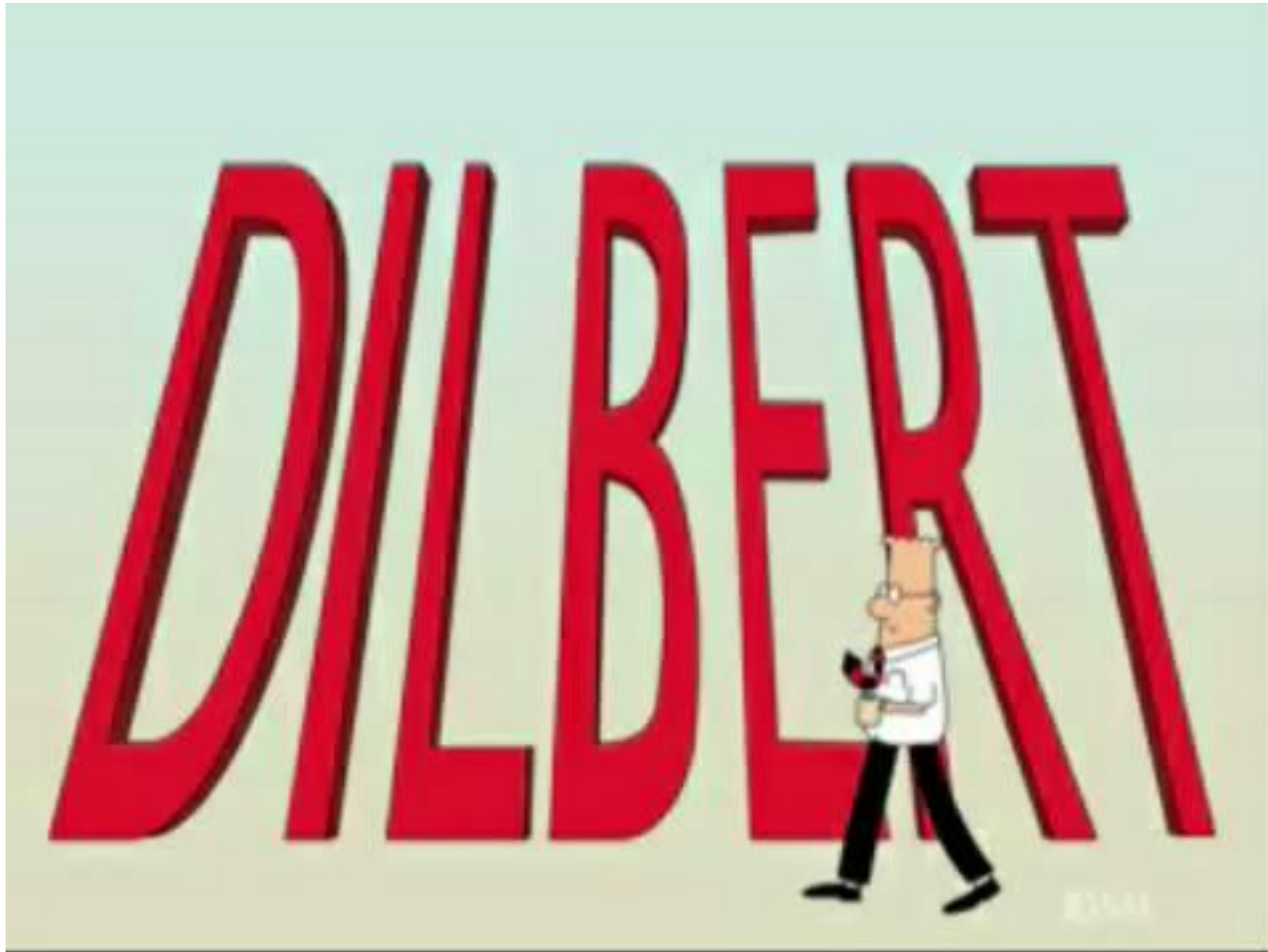


Challenges

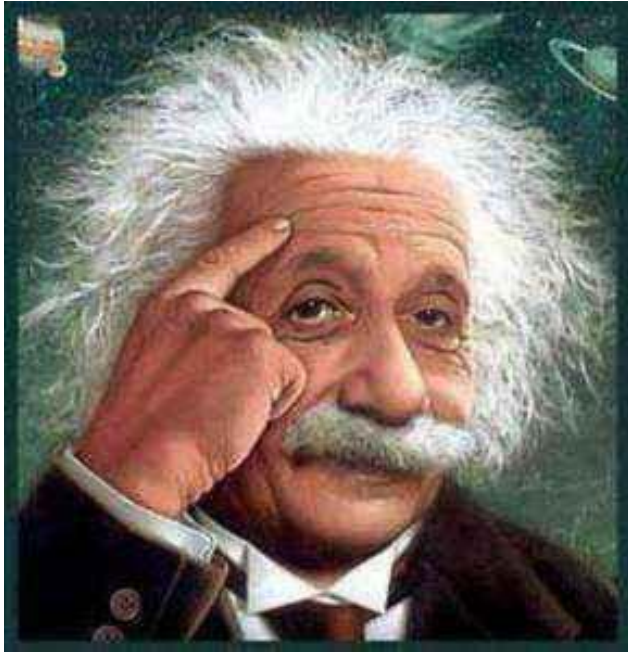
- I have a challenging sales target to meet
- The markets are too volatile
- My line manager gives me no support
- I don't have time

- **Actually: I'm my own worst enemy!**





A new and dynamic approach ...



The definition of insanity:

“Doing the same things repeatedly,
expecting the outcome to change.”

“No problem is solved with the same consciousness that created it.”



Self assessment ...

- Are you following ***your own*** documented business development strategy and sales plan for 2012?
- Have you reviewed your 'performance' against your plan regularly, fine-tuning and changing as necessary?
- Do you have things other than AUM, NNM, and fee income numbers on your strategy and plan?
- If you don't know where you're going, any road will take you there!



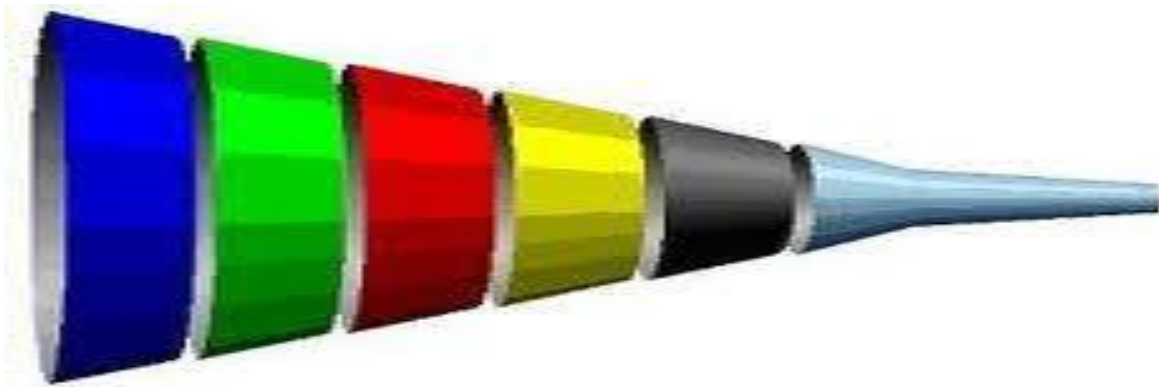
A sales strategy

- What makes you different – what's your personal *Value Proposition*?
- What activities are you trying that are new (to you)?
- What type of clients do you want to add to your portfolio?
- Where will you find them?
- Are you looking in new places?
- Are you stretching yourself to achieve more than your MALP?
- What are your key strengths?
- Where are your biggest skill gaps?
- How do you plan to fill these gaps?



A sales plan

- Is your finger on your own pulse?



Manage the relationship

Grow the relationship

Prospect > Rapport > Understand > Propose > Win

- Actions speak LOUDER than words!
- *“Plans are only good intentions unless they immediately degenerate into hard work” - Peter Drucker*
- It shouldn't be a solo exercise



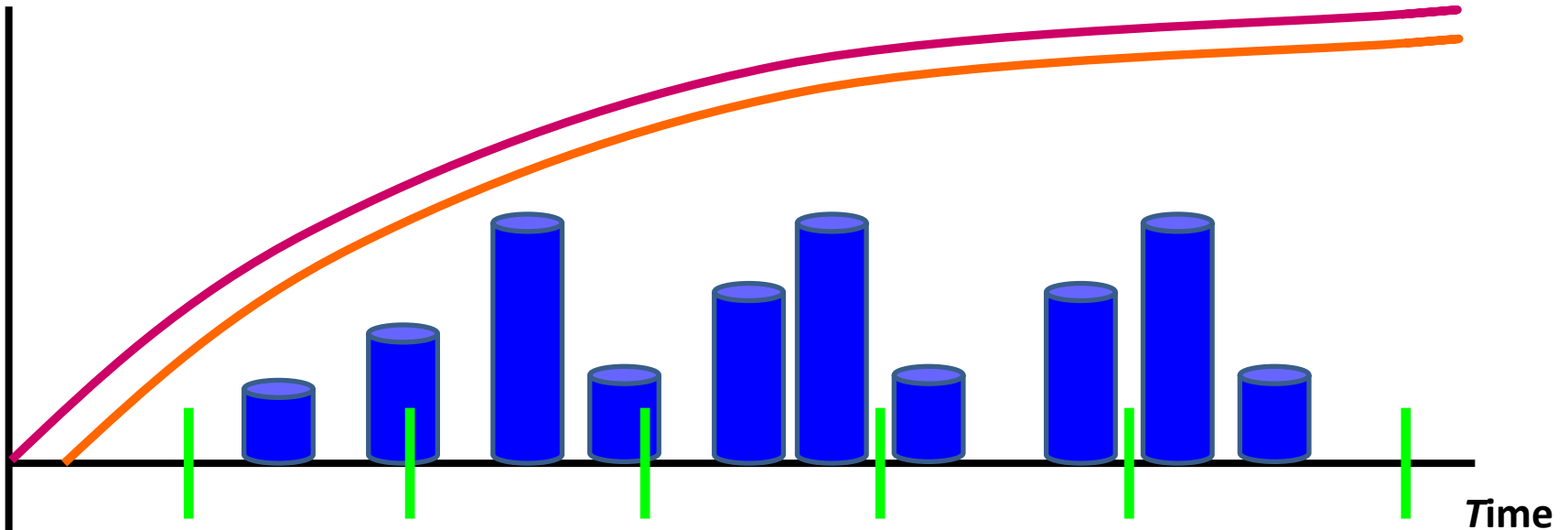
Creating referrals and networks

The 'currency' of successful client relationship management

- Trust
- Value
- Goodwill
- Contact



Worth



Ask yourself these key questions:

- What have I done to grow **trust** this week?
- What have I done to provide **value** this week?
- How much of the 'right' **contact** have I had this week?
- How much have I increased the worth of my **goodwill**?
- When was the last time I 'spent' some of my **goodwill**?
- Am I already in overdraft?



The sales behaviours of champions

Being patient taking time, and building



Doing more



and much less



Asking clients great



and not just



Helping clients see



not just the



"People are always blaming their circumstances for what they are. I don't believe in circumstances.

The people who get on in this world are the people who get up and look for the circumstances they want, and if they can't find them, make them."

George Bernard Shaw

