Record Nr. UNINA9910139014003321 Autore Paczosa Scott Titolo Selling professional and financial services handbook / / Scott Paczosa, Chuck Peruchini Pubbl/distr/stampa Hoboken, New Jersey:,: Wiley,, [2014] ©2014 **ISBN** 1-118-72844-0 1-118-72820-3 1-118-72809-2 Descrizione fisica 1 online resource (191 p.) Collana Wiley finance BUS027000 Classificazione Altri autori (Persone) PeruchiniChuck Disciplina 332.1068/8 Soggetti Financial services industry Strategic planning Selling Lingua di pubblicazione Inglese **Formato** Materiale a stampa Livello bibliografico Monografia Note generali Includes index. Selling Professional and Financial Services Handbook; Contents; Nota di contenuto Preface: Acknowledgments: A New Way to Sell: Chapter 1 Changing Times, a New Dimension: The Rock-Ripple Strategy; IT'S ALL ABOUT RECOGNIZING CHANGE; WHAT THE MAN ON THE DOORSTEP DID; SENSE THE WAVE, TRACE THE RIPPLES; THE ROCK-RIPPLE EFFECT; Chapter 2 Fields of Vision, New Relationships: On Being a Guru; WHAT DOESN'T WORK; WHAT DOES; BUILDING GURU STATUS; CREATIVE SOLUTIONS;

WHY THE FIRST MOVER WINS; GETTING STARTED, FROM WHEREVER YOU MAY CURRENTLY BE
HOW THE STAGES WORK Stage 1: Identify; Stage 2: Evaluate; Stage 3: Innovate; Stage 4: Deploy; Stage 1: IDENTIFY; Chapter 4 The Identify Stage: What to Look For; THE INDUSTRIAL MINDSET; DEFINING AND THINKING ABOUT WHAT TO LOOK FOR; EXPERIMENTS IN MIND STRETCHING; DRAWING PARALLELS; Chapter 5 The Identify Stage: How to Look Systematically; THE ENTREPRENEURIAL MINDSET; PUTTING YOURSELF IN THE PATH; TAPPING THE INTERNET; TAPPING HUMAN INTELLIGENCE; NARROWING DOWN AND HOMING IN: HOW THE

WHAT'S NEXT?: Chapter 3 Four-Stage Process: Why and How It Works:

IDENTIFY PROCESS COMES TOGETHER; MOVING ON . . .; Stage 2: EVALUATE

Chapter 6 Intro to Evaluation: Basics and the First Step THE PROCESS: FIRST THINGS FIRST; LOST IN SPACE; OTHER POSSIBLE OUTCOMES; NUMBERS VERSUS JUDGMENT; MOVING ON; Chapter 7 Deeper Evaluation; EVALUATION POINTS; GETTING TO "NO"; A NOTE ON STRATEGY VERSUS SALES SKILLS; "YES," PLUS CONTINUOUS IMPROVEMENT; EVERY STEP COUNTS; "YES," PLUS ONE FOR THE PORTFOLIO: Stage 3: INNOVATE: Chapter 8 Innovation and Preparation: WHERE YOU STAND IN THE PROCESS; INNOVATING THE SOLUTION; THE MULTILAYERED BENEFITS OF INNOVATION; INNOVATING THE CAMPAIGN: BUILDING THE PACKAGE FOR THE SALES FORCE BACKGROUND MATERIALSTARGETING; THE MESSAGE AND THE TALK TRACK; THE PROFESSIONAL TEAM AND QUALIFICATIONS; Chapter 9 Top-of-Mind Awareness Tools and Launch; PARALLEL MARKETING EFFORTS FOR PERSISTENT ISSUES; TARGETS, TRACKING, REPORTING; THE LAUNCH CALL; Stage 4: DEPLOY; Chapter 10 Transforming How You Sell: What's New, What Isn't; A GAME PLAN, NOT BASIC COACHING; WHAT YOU ARE SETTING OUT TO DO IN THE DEPLOY STAGE: TRANSFORMATION, NOT A BLITZ; Chapter 11 Steps to Full Deployment; TRACKING, REFINING, AND EXTENDING THE INITIATIVE; WHAT'S NEXT, WHAT'S NEXT?

INITIATIVES MAY END, BUT THE PROCESS DOESN'T; BUILDING RELATIONSHIPS WITH CONTENT TOOLS AND EVENTS; SELLING TO BOTH SIDES OF THE CLIENT; ROUNDTABLES AND OTHER "SCALE" OUTREACH EVENTS; KEEP IT SIMPLE; EXTENDING RELATIONSHIPS INTO OTHER INITIATIVES; THE MULTIPLIER EFFECT AND THE SMALL-WORLD EFFECT; INDIRECT SALES: THE ULTIMATE PAYOFF; Chapter 12 Hunting or Farming? It's Both: An Approach for New and Existing Clients; THE DOWNSIDES OF ACCOUNT-CENTRIC FARMING (AND WHY ROCK-RIPPLE IS SUPERIOR); EFFICIENCIES ON THE HUNTING SIDE; WHERE THE DIFFERENCES COME IN; INDIRECT SALES: THE BIG DIFFERENCE Chapter 13 Where to Go from Here

Sommario/riassunto

"Times are tough for people who sell financial services and this book offers a new solution proven in practice. The book describes methods the authors have used and taught since the 1990's, most recently at a major consulting firm, where they led a national sales team to revenue gains of 500% over four years -- in a period that included the recession of 2008-2010. Their book shows how the same approach can grow sales for public financial service firms struggling to sell to corporate and institutional clients in today's tight economy. The solution is not any new twist on face-to-face selling techniques or the art of persuasion. It's a strategic approach built around a simple fact: the markets are tight but far from static. Even with lean budgets, client companies must respond to urgent changes and emerging threats in their industries. Thus they will buy services from the sellers who can help them detect, understand, and cope with what's coming their way. The book outlines a systematic way of becoming such a valued resource. Readers learn to scan the horizon for early signs of "rockripple events." Major changes in the business world often spring from new developments that are little noted or heeded, at first, by the client companies soon to be affected by them. But like a rock dropped in a pond, these events set off ripples that sweep through entire industry sectors, creating must-have service needs"--