

# Proven Prospecting Strategies to Secure Remarkable Results



# Agenda



- Key Traits of Effective Prospectors
- Roadmap to Client-Driven Sales
- The Stories You Tell Yourself
- Sales Call Reluctance is Devilishly Costly and So Unnecessary

# Chris Holman Bio



- Executive Coach, Horseshmouth
- Professional Certified Coach (PCC), ICF
- 36 years in financial services
- Coached 2000+ advisors
- Created Horseshmouth Group Coaching, 30 coaching groups completed

# Connie Kadansky Bio



- Founder: Exceptional Sales Performance
- Professional Certified Coach (PCC), ICF
- Past speaker: MDRT, NAIFA
- Clients include: Merrill Lynch, Allstate, New York Life, American Express, Bank of Montreal

# Key Traits of Confident Business Developers

- Drive: Psychological need to convince someone else to do something. Low ego drive won't ask for the appointment and the business.
- Cognitive Empathy: Taking the perspective of the buyer and asking people what they need.
- Resilience: Handle "rejection" well.
- Service mindedness: Desire to help others. Accommodating and pay attention to the other person.
- Conscientiousness: Meticulous, have a follow up plan, execute business development well.

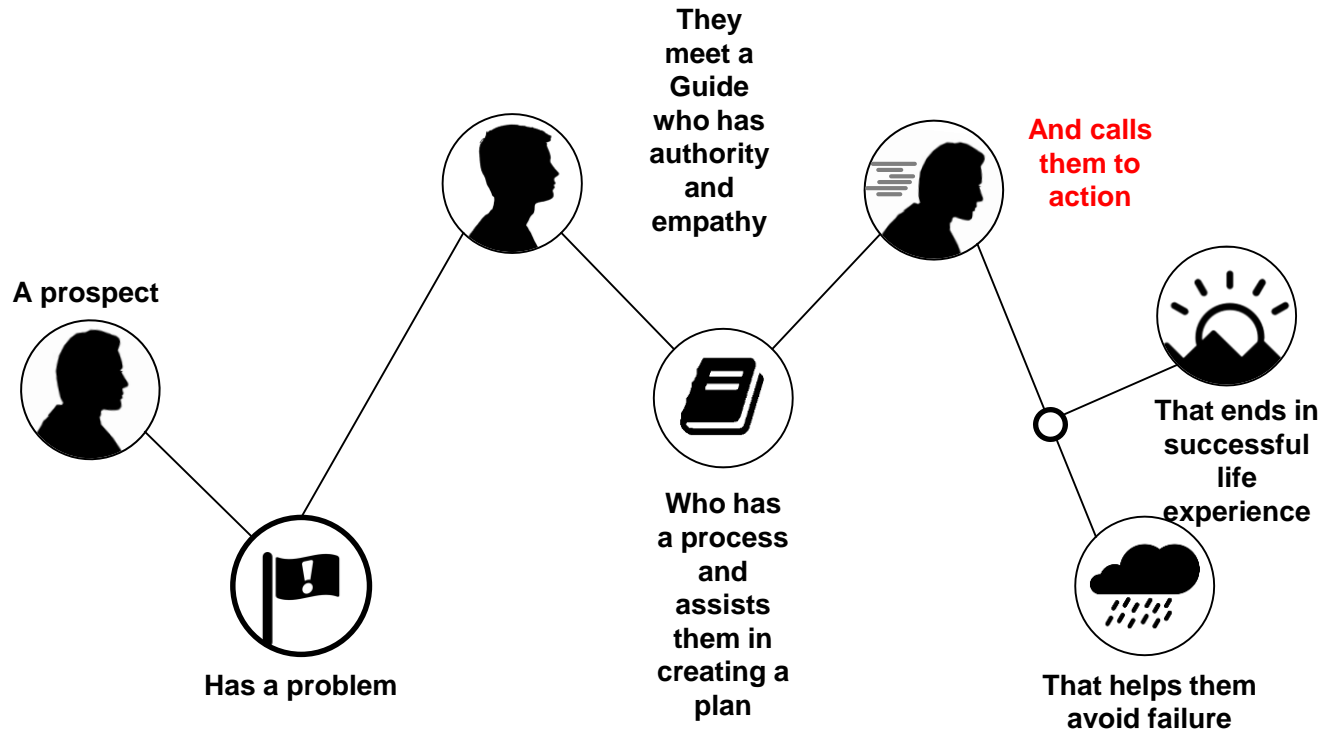
# 80% of prospecting is emotional

- Self-reverence: Deep respect for yourself – you'll automatically respect others.
- Self-knowledge: You know what pushes your buttons:  
You embody and own your Value
- Self-control: Ability to discipline yourself around prioritizing your prospecting.

# 20% of Prospecting is the Mechanics

- Millions of relevant mechanics on the “how to.”
- There is an Infinite variety of schemes that keep advisors from looking deeper into how their energy calling card influences their success.

# Roadmap to Successful Client Driven Sales: Donald Miller





# Prospecting

- Uncertainty when we prospect.
- Uncertainty fuels anxiety.
- Anxiety leads to distress.
- Distress stimulates fear.
- Fear creates doubt.
- Doubt wastes energy.

# Curiosity

- The desire to learn:
  - Inquisitiveness
  - It is hard-wired into our brain!
- People outgrow their need for certainty by being curious.



# Emotional Resilience





# High Achiever v. Happy High Achiever

- 92% Are Unhappy
- HHA's know how to handle their feelings
- They monitor their internal conversation
- They are real about what they can and cannot control
- "I did my best with everything I had at the time."



horsemouth

GROUP COACHING



# Formula

- Identify an event that triggered fear, doubt or anger. What happened?
- What are the sensations in my body when I reflect on this event?
- What are my emotions/feelings around this event?
- What story am I telling myself?

# What story am I telling myself?

- Stories you tell yourself decide your success
- Get objective about your story – your rationalization, your reasoning for struggling, delaying, failing to achieve results
- Reflect on past experiences



# Self-Doubt Spiral



# Coping is fear-based

- Release stress through addictions: alcohol, drugs, sweets, shopping, etc. etc.
- Prescription drugs for depression
- Stops all emotional maturity when we chemically handle stress
- Constructive releases: Physical sports, hobbies, interests, volunteering

# Sales Call Reluctance

- Emotional hesitation to prospect and self-promote
  - ✓ Telephobia is the easiest to overcome!
  - ✓ Referral aversion
  - ✓ Social Self-Conscious: Intimidated by the HNW prospect
  - ✓ Role Rejection: Not comfortable in sales role

# Sales Call Reluctance is an Emotional Threat

Boxed in self-protective barrier



Fear is a mental response to a perceived threat.



# Four Blocks to Fearless Prospecting

- Assumptions
- Perceptions
- Limited Beliefs
- Inner Critic



# Thought Realignment

Attitude

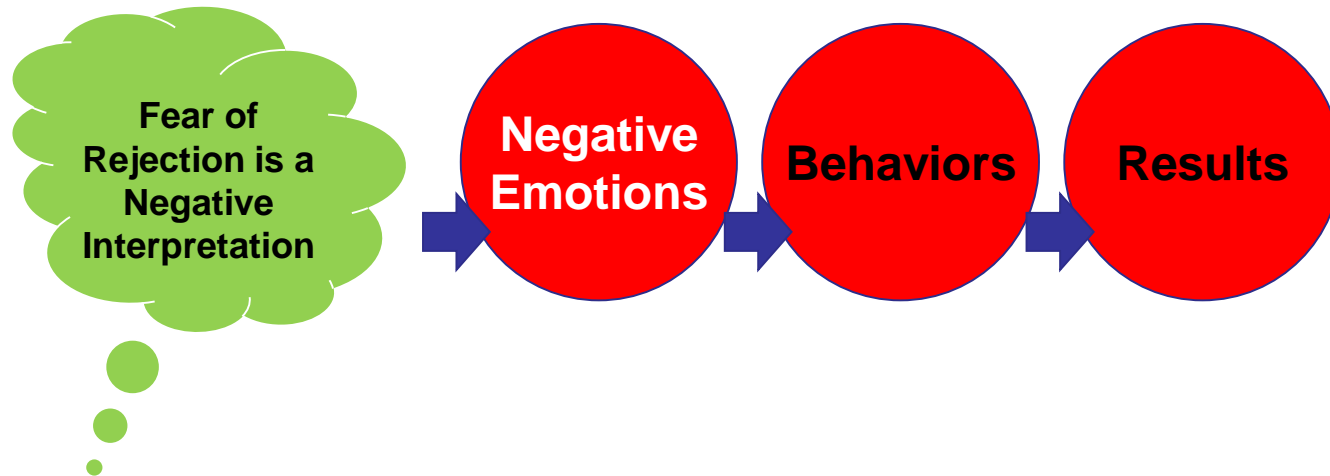
Belief

Think

Feel

Do





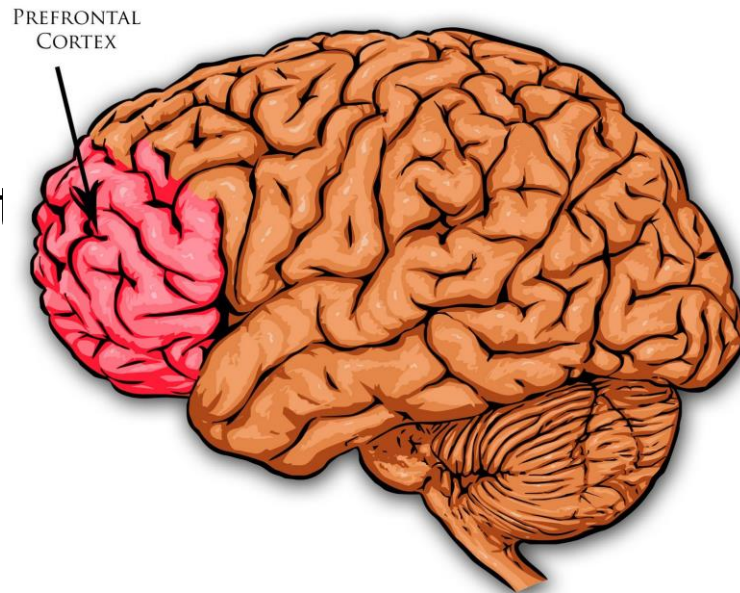
# Miracle is a Shift in Perception



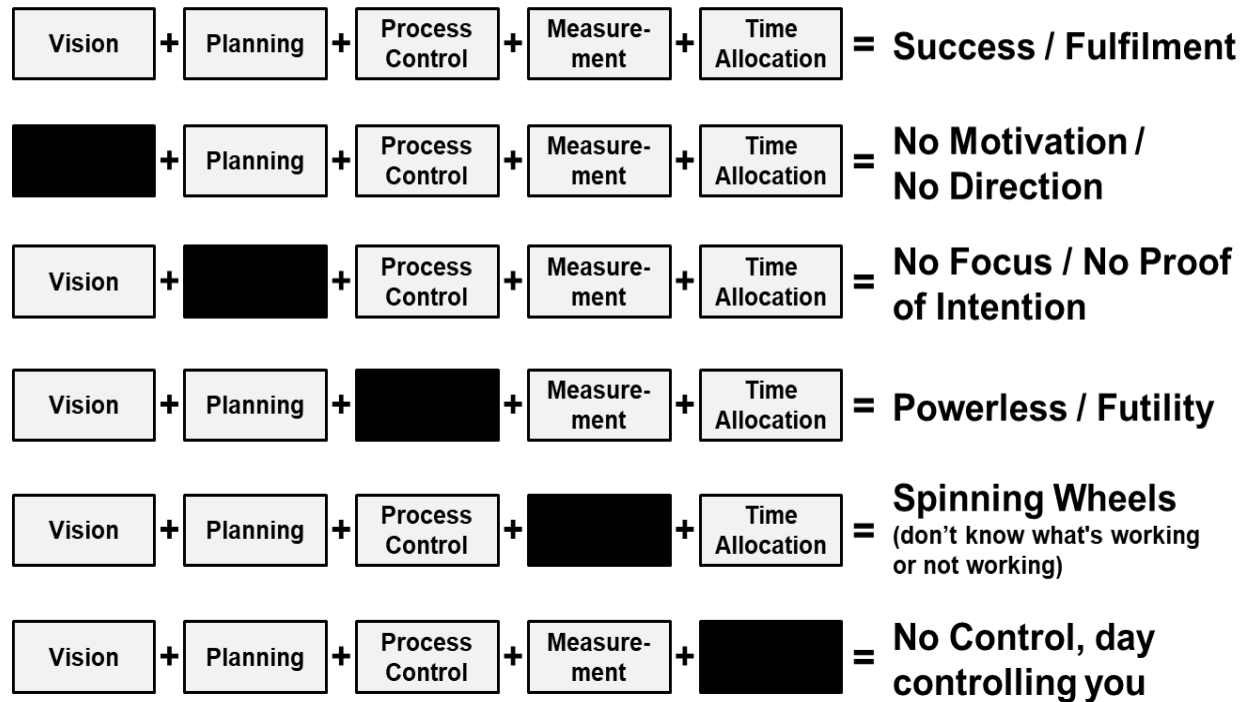


# Prefrontal Cortex: Executive Brain

- Possibilities
- Opportunities
- Empowerment
- Vision
- Imagination



# Consistent Action - Execution



# If you'd like to dig deeper...

## 1. Forget Referral 'Secrets' and Focus on Fundamentals

Stop looking for new silver bullets that will magically produce referrals from thin air—they don't exist. But if your clients trust you and know whom you serve, they may very well do the referring for you, provided you give them proper preparation.

## 2. Prospects Not Replying? How to Follow Up Better and Move to Close More Quickly

“Touching” your prospects without moving the process forward is worse than not contacting them at all. In fact, it makes you look like a common salesperson interrupting dinner. Learn how to do meaningful follow-up to improve your results and stop wasting your time and money.

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