



Mortgage and Protection Selling Masterclass

Learn how to seamlessly sell protection alongside mortgage and lending products

Delivered by the renowned financial services sales expert Paul Archer, author of *Rapportselling Tales*, *Successful Selling Strategies for Engaging Customers*.

Paul will share with you the latest sales techniques that are very relevant for the modern internet savvy consumer who are quite comfortable to buy from the internet. He'll show you how to plan for them holistically using the lifeline financial planning tool and to coach rather than sell.

The Masterclass is equally suitable to someone new to the advisory business or someone who wants to refresh themselves as they are embarking on a protection selling model.

The workshop will be conducted personally by Paul Archer, almost 30 years in the financial services sales business as salesperson, sales manager, training manager and independent sales consultant to dozens of financial services firms in the UK and abroad.

Packed full of practical sales and communication tips, techniques and strategies, Paul will guide you through the holistic financial planning process which he's dubbed *Rapportselling*, so you can turn these strategies into pure skill following the workshop.

The workshop will cover:

- Sales foundations – the personal inner game and the value proposition you promote with customers
- The 3 elements of trust – when and how to ensure you nail these 3 elements very early on in the process.
- Pre-empting objections and later reservations – bringing in the subject of budget early on, the holistic package concept and signposting
- Coaching customers with CIGAR
- The Lifeline soft needs tool – a powerful, yet simple tool to aid a discussion about the client's life, past, present and future, to explore their goals and ambitions for themselves. Totally holistic and in a coaching style.
- Earmarking and revealing gaps in protection, helping them to make a buying decision, using a question sting to help them see the absolute need for proving protection in their lives
- Advanced communication strategies – a curious questioning style, global listening and non verbal communications.
- Presenting and moving the sale forward – presenting the whole package, reading buying signals and gaining commitment
- The referral engine – how to obtain referrals on an industrial scale

Call or email now to discuss how we can tailor the workshop for you



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