



Sales and Marketing

Our sales come from various distribution channels. Perhaps most of our clients come from financial advisors. Others may obtain their clients from casualty agencies, health brokers, CPA's, payroll companies, attorneys or referrals from the existing clients.

We have discussed the type of business models that each of you have.

- How do we grow this business?
- Are there other sales distribution channels to consider?
- Can more than one distribution channel be developed?
- Can you go direct?
- What is your budget for sales and marketing?
- How many sales people do you have?
- How do you compensate them for sales?
- How are you focusing your collateral marketing material to your business model?
- Who is the focus?
- Does your website and collateral materials match?
- How long is your sale cycle?
- How do you monitor your pipeline?
- How long does it take to make a case profitable?
- Are there opportunities for cross selling?
- What functions will you utilize to attract the optimal referral sources?

Focus – One Distribution Channel

Current Clients

Referrals from current clients

- Clients: terrorists or ambassadors?
- Do you ask for referrals?
- When is the best time to ask?
- How do you ask?
- Do you do monitor customer satisfaction?
- What is your most effective way to measure customer satisfaction?

Events

- What functions will you do to attract the right referral source?
 - Seminars
 - Webinars
 - Person to person meetings
 - Office visits
 - Social gatherings
- How do you organize an event?
- How do you get appointments or follow up on opportunities at an event?

Messaging

- What category segments will you focus on?
- How do you communicate your value?
- How do you prove your points of differentiation?
- How do you create emotional connections with clients?