

WELCOME

How to Transform Your Sales Performance





AGENCY MANAGEMENT FORUM

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How to Transform Your Sales Performance

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The Trusted Choice®

Sales Transformation

Presented by Dustin Wambsgans

Today's Outline

Topic Highlights

1. Becoming Your Best Version
2. Activities vs. Results
3. Exit Barriers
4. The Ultimate Advantage
5. Differentiate To Dominate
6. Overflowing Pipelines
7. Professional or Amateur?



1

Becoming Your Best Version Possible

- ✓ Intro & Agenda
- ✓ Design Your Future
- ✓ Delta Airlines
- ✓ Current Business Model





Intro to my story

About me

Designing your future

Goals

Retaining & obtaining your ideal client

Best version possible

WIN - What is normal?

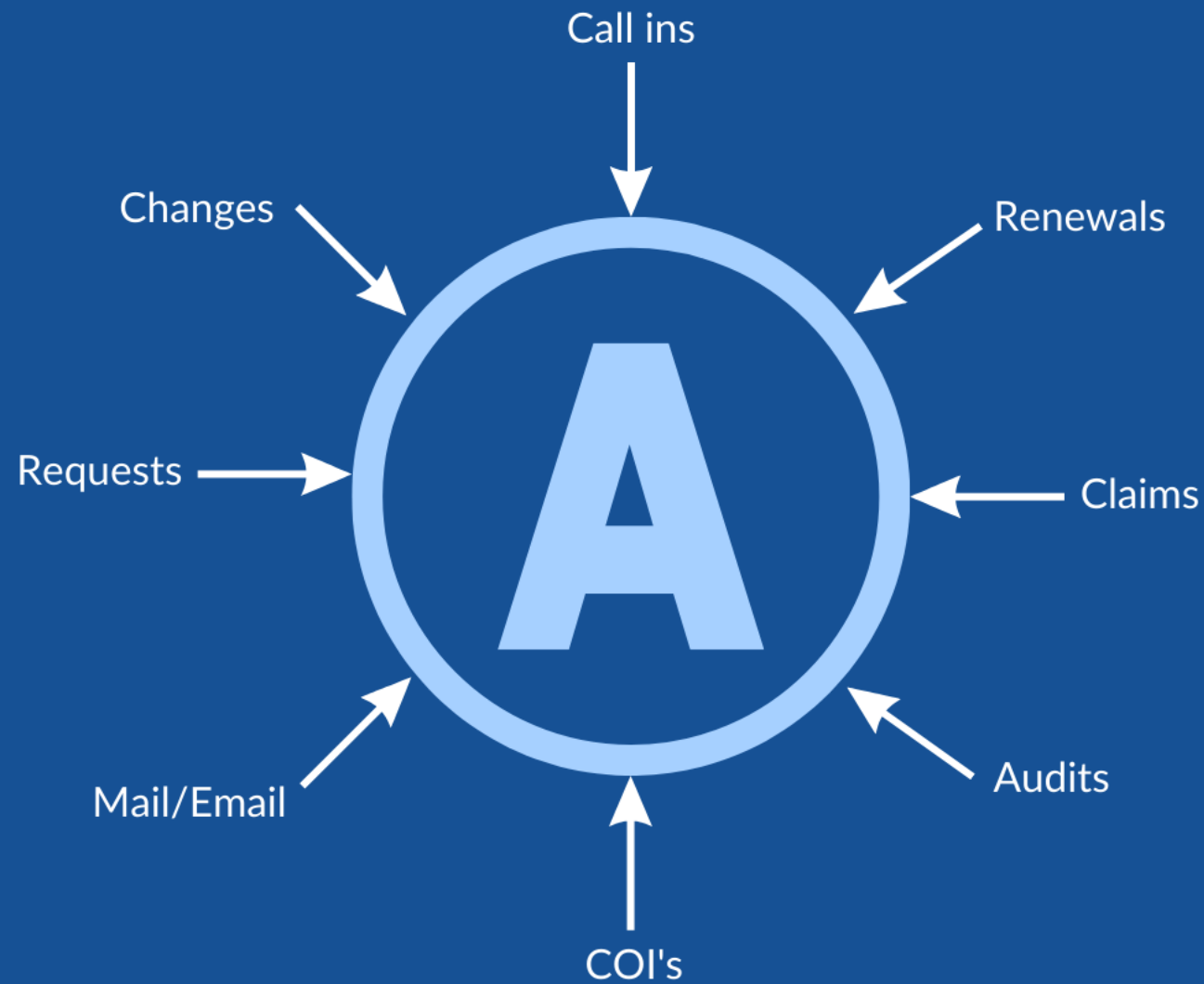
Your current bizz model is perfectly designed
for the results you are currently getting

2

Activities vs. Results

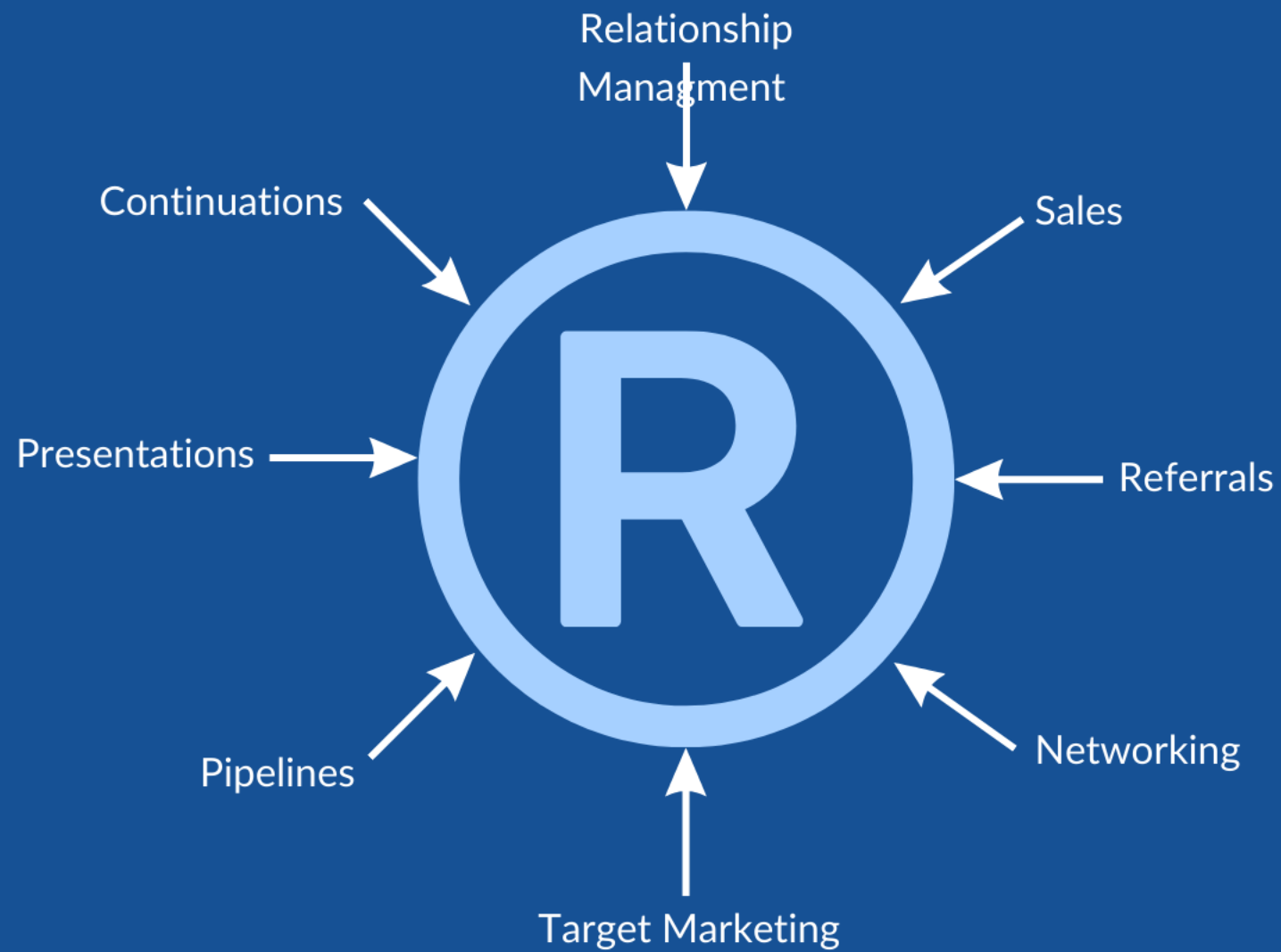
- ✓ Unique abilities
- ✓ A/R circles
- ✓ In the green
- ✓ Service hand off
- ✓ High performance teams
- ✓ The producer's perfect schedule





Activities are the agency/service teams' responsibilities.

Results are the producers/sales leaderships' responsibilities.



Pay vs. No Pay Activities

Producers Perfect Schedule

	MON	TUES	WED	THURS	FRI
Prep Day	Sales Meeting	AM Meeting	AM Meeting	AM Meeting	Clean Up
	HPT Meeting	Noon Meeting	Noon Meeting	Noon Meeting	HPT Meeting
	PM Meeting	PM Meeting	PM Meeting	PM Meeting	Major Relationship Visit
	"Power" Hour	No Pay	No Pay	No Pay	

3

Exit Barriers

- ✓ The Five Exit Barriers
- ✓ Full Time Clients Only
- ✓ Relationship Management
- ✓ Continuation Process
- ✓ Trusted Advisor -
Indispensable Partner
- ✓ Retention and Referral Analysis



Differentiate to Dominate

1

Pivoting from
transactions
to
relationships

2

Automated
Customer
Journey

3

Thank
yous

4

Client
profile

5

Continuation
process

4

The Ultimate Advantage

- ✓ Skills to be practiced
- ✓ Why people buy
- ✓ 30-second commercial



The Trusted Choice®



**Upfront
Prep**



**Training
Wheels**



**Asking
Questions**



**Presentation
Rehearsals**
*Every opportunity
deserves my very best*



**Telephone
Scripts**

Skills To Be Practiced



The Ultimate Question: Why People Buy?

Price - Cost - Problems or Pains

The Ultimate Advantage

30-Second Commercial

Answers the question 'what do you do'

2-Minute Infomercial - Products

Questioning skills

Asking for referrals

What People Care About

Their clients

Employees

Profit

5

- ✓ Points of differentiation
- ✓ Avoiding the generic 3
- ✓ Points of differentiation questions

Differentiate To Dominate

The Generic 5

1. We have the best service
2. We represent all the carriers
3. We're local and been in business for 50 years
4. We can save you money
5. We have the best people

Areas to consider:

What's your advantage?

Why does it matter?

Can you back it up?



**Points of
Difference**

6

Overflowing Pipelines

- ✓ Pipeline Development
- ✓ Targeted Account Strategy Plan
- ✓ Networking Planning Guide
- ✓ Producer's Improvement Cycle
- ✓ Key Performance Indicators





Roundtable Discussion

What Niche markets are you targeting?
Why are you the solution?



WHO?

Profile

Research

(key underwriting concerns/frustrations)

Specialize

(What are you known for?)

Where

(Referrals, leads, LinkedIn)



HOW?

Names

Lists

Target Account Strategy Plan

Future Ideal Client Focus

7

Professional or Amateur?

- ✓ Clarity
- ✓ Consistency
- ✓ Greatness Tracker
- ✓ Commitment
- ✓ Culture of Accountability

Clarity

*Where am I today?
Where do I want to go?
How will I get there?*

Consistency

Commitment

Greatness Tracker

Track your results

Producers BVP Pyramid

Culture Of Accountability

How will you maintain a culture of accountability?

Professional or Amateur?



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Stay in Touch!

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Book a 1-hr Free Consulting Session

Scan the QR code!



Thank You

