

The 14-Point Team Selling Checklist

Sales “Silos” Aren’t Effective Anymore

...You want an entire team pulled together to win the WHOLE relationship...the 401K, the employee accounts, the HSAs, the loans and the deposit accounts. Having just a single sales person start that relationship is, well, dangerous.

Sales go up dramatically and pricing becomes less a consideration under a team sales model. You have to ask yourself, “Do our current systems stifle the collaboration necessary to win the whole relationship from more clients?” If you’re considering jumping into a team selling model make sure your prepared with these 14 key steps.

1. Select team members who have specific expertise that adds value to the customer to accelerate the process.
2. Make sure the team lead has a “low-risk” emotional intelligence score of “hunter profile” and controls the conversation (that profile outsells a medium-risk profile by 400 percent.)
3. Prepare at least three Level-4 Unique Selling Propositions prior to the call.
4. The top 100 prospects must have at least 2 executives on the team.
5. Evaluate the results of each team member at the end of each sales situation.
6. Make sure that the sales presentation doesn’t start until the end of the second meeting—when all discoveries are complete and extreme value has already been offered.
7. Make sure that all appropriate team members—insurance and wealth management are added—but not all team members must be at all meetings.
8. Create a “common template” for the calls to align the team and make sure that teammates don’t come across as disorganized.
9. Do not allow “bad chemistry” on any team—it will be apparent to your customer.
10. Make sure there is a team lead who assigns the “who does what by when” and outlines steps in preparation for the final presentation.
11. Any one person can, by violating the sales process, destroy the desired result—it must be clear who is the only designated person to respond if the customer at any points is negative.
12. Be clear of the goals and outcomes of each meeting.
13. Fully utilize the experience and skills of each team member.
14. Make sure the team has a process to be extremely responsive to the ongoing needs of the customer.

The secret to team selling is building the right team, with the right combination of emotional intelligence scores. The only reliable measure: the ZERORISK assessment. For a free trial, go to EmmerichFinancial.com/ZERORISK or call (952) 737-6730.