

10 Questions to Help Rate Your Sales Skills

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ABSTRACT (ENGLISH)

When you tally your points, the higher the better. I have a game plan for every interaction with a client, prospect and COI. 1 2 3 4 5 I'm an active listener and I'm genuinely curious about other people. 1 2 3 4 5 I approach a social contact about working together, without being salesy. 1 2 3 4 5 I excel at going deeper in conversations, creating an emotional connection. 1 2 3 4 5 I modify my communication style to match the person with whom I'm speaking. 1 2 3 4 5 I generally establish a next point of contact before my conversations are over. 1 2 3 4 5 I clearly articulate what differentiates me from other financial advisors. 1 2 3 4 5 I am careful not to speak too much or too fast. 1 2 3 4 5 I move on from rejection quickly, without taking it personally. 1 2 3 4 5 I ask questions and make recap statements to show I've been listening. 1 2 3 4 5 As you've already probably determined, most of the skills listed above can be used in a client review meeting, during conversation at a social gathering, during lunch with COI, or in a host of other scenarios. [...]yes, you're social – but you're also intentional, as you're committed to executing your game plan. The reality is it's a hybrid, more listening than talking, but being intentional, having an antenna activated for opportunities and being able to mini-close (which is all you need to master to get the business).

FULL TEXT

A couple of weeks ago, I was talking to one of our coaching clients and he told me about a conversation he had with his niece who had just graduated from nursing school. She had called him for guidance on handling job interviews. Without getting into all the details, he gave her some invaluable advice. At the end of the conversation, his niece concluded with, "So you're asking me to sell myself by asking questions?" To which he responded, "Anyone who's good at sales starts by asking questions." She heeded his advice and went on to nail her first and only job interview.

The financial advisor who shared this story fully understands the sales process in today's world, having brought in more than \$80 million in new assets last year, and being ahead of that pace in 2022.

Unfortunately, whenever sales skills are mentioned, we tend to think of basic sales training for rookies. This type of sales training is often focused on prospecting, closing techniques, and handling objections. The reality is that "selling" happens everywhere. In the world of professional services, there's a need to consistently "re-sell" yourself, staying visible and relevant to clients and centers-of-influence.

As we continue to study the best practices of elite advisors, we've been able to identify 10 sales skills that are consistently at work. As you'll notice, they're largely relationship-based and require interpersonal skills.

Use the 10 statements below to rate yourself, with 1 equaling "needs serious attention" and 5 equaling "complete mastery." You can then ask other members of the team to rate themselves. After all, everybody is selling. When you tally your points, the higher the better.

I have a game plan for every interaction with a client, prospect and COI.

1 2 3 4 5

I'm an active listener and I'm genuinely curious about other people.

1 2 3 4 5

I approach a social contact about working together, without being salesy.

1 2 3 4 5

I excel at going deeper in conversations, creating an emotional connection.

1 2 3 4 5

I modify my communication style to match the person with whom I'm speaking.

1 2 3 4 5

I generally establish a next point of contact before my conversations are over.

1 2 3 4 5

I clearly articulate what differentiates me from other financial advisors.

1 2 3 4 5

I am careful not to speak too much or too fast.

1 2 3 4 5

I move on from rejection quickly, without taking it personally.

1 2 3 4 5

I ask questions and make recap statements to show I've been listening.

1 2 3 4 5

As you've already probably determined, most of the skills listed above can be used in a client review meeting, during conversation at a social gathering, during lunch with COI, or in a host of other scenarios. The secret is being able to combine relationship building with strategic intent. So yes, you're social –but you're also intentional, as you're committed to executing your game plan.

Some people in sales can develop relationships, but aren't able to land the business that's right in front of them. Others think that selling is all about talking and asking for the business. The reality is it's a hybrid, more listening than talking, but being intentional, having an antenna activated for opportunities and being able to mini-close (which is all you need to master to get the business).

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