



## Wholesaler Effectiveness

<b>Self Manager</b> <i>Focused Optimist</i> <i>Role Modeling</i>	<b>Territory Manager</b> <i>Consistent Cultivator</i> <i>Staying on Course</i>	<b>Resource Manager</b> <i>Strategic Orchestrator</i> <i>Concierge</i>	<b>Relationship Manager</b> <i>Long-term Ally</i> <i>Alignment</i>	<b>Practice Manager</b> <i>Business Consultant</i> <i>ValYOU</i>
<ul style="list-style-type: none"> <li>✓ Retains the ability to keep moving forward</li> <li>✓ Create a positive atmosphere that makes selling enjoyable for self and advisors alike</li> <li>✓ Possesses the energy to persevere during tough times</li> <li>✓ Plans activity effectively                             <ul style="list-style-type: none"> <li>■ Quarterly</li> <li>■ Daily</li> <li>■ For each call</li> </ul> </li> <li>✓ Consistently does business in an effective professional manner                             <ul style="list-style-type: none"> <li>■ Phone calls</li> <li>■ E-mails</li> <li>■ Reports and paperwork</li> </ul> </li> <li>✓ Remains composed under stress</li> <li>✓ Coachable</li> <li>✓ Deals with change showing versatility and flexibility and can change tactics as market or management requires.</li> </ul>	<ul style="list-style-type: none"> <li>✓ Prioritizes, plans and manages territory</li> <li>✓ Allocates time based on account profitability and relationship</li> <li>✓ Balances time and effort among targeted, new, current, and dormant advisors</li> <li>✓ Leverages channel partners to increase total territory production</li> <li>✓ Segments advisors by value matches and productivity</li> <li>✓ Accesses hard-to-reach top decision-makers</li> <li>✓ Balances time and effort between normal sales cycle and long cycle big payoff cases</li> <li>✓ Leverages expenses wisely to create new business</li> <li>✓ Leverages technology to save time</li> </ul>	<ul style="list-style-type: none"> <li>✓ Creates connections between Company and advisors to exchange information</li> <li>✓ Helps make it easy for advisors to work with company.</li> <li>✓ Develops a network of key players in their accounts</li> <li>✓ Possess the ability to expedite all aspects of the sale</li> <li>✓ Knows products and how to position and present them</li> <li>✓ Understands sales strategies and applications</li> <li>✓ Knows where to find and access Home Office resources</li> <li>✓ Effectively cross-sells</li> </ul>	<ul style="list-style-type: none"> <li>✓ Conveys a sense of shared purpose with advisors</li> <li>✓ Develops mutual trust with advisors</li> <li>✓ Has a genuine interest in advisor's business, problems and concerns</li> <li>✓ Knows how to establish a connection with advisors and co-create value</li> <li>✓ Creates balanced relationships by providing insightful advise and delivering relevant solutions</li> <li>✓ Creates relationships strong enough to withstand problems (Evergreen Relationships)</li> <li>✓ Establishes and cultivate long-term relationships</li> <li>✓ Effective one-on-one skills; good interpersonal skills</li> <li>✓ Is curious, asks questions that cause thinking and change</li> </ul>	<ul style="list-style-type: none"> <li>✓ Focused, accurate and knowledgeable about the advisor's:                             <ul style="list-style-type: none"> <li>■ Products</li> <li>■ Markets</li> <li>■ Advisor's needs</li> <li>■ Business and personal objectives</li> </ul> </li> <li>✓ Expertise goes beyond Company products and services</li> <li>✓ Uses a consultative, needs-based approach to support the advisor.</li> <li>✓ Serves as experts in creating solutions based on what they sell</li> <li>✓ Able to internalize their advisor's point of view</li> <li>✓ Advisors asks for advice about their high-level decisions and policies that have a long-term impact their business</li> </ul>