



## COACHING CLINIC



# The perfect sales pitch

Do you sell yourself in a way that reflects your service proposition? Doug Mathlin says it may be time to review your sales presentation

I have previously stated that brokers need a compelling service proposition before they start marketing themselves to their database of clients and prospects seeking repeat and referral business.

The whole purpose of keeping in touch with these people is to remind them of the services that you offer – and to add value to the services already provided.

When you contact your client database, the outcome you want is for the client or prospect to think about the time they transacted with you and hopefully recall the fantastic experience that is was.

If you do not achieve this result, the intentions of your marketing campaign will not be met. The thing that your clients should remember most clearly about the service that you offer is the time they spent face-to-face with you (and completing the loan application).

I will refer to this event as the 'sales presentation' because you are not only selling the lender and their product, but also your company and yourself and hopefully your referral program.

Hopefully you achieve a sale in all three:

- the lender and loan
- your company and you
- your referral program

### Presentation skills

If you want to be in the top 10% of your industry, you need a brilliant sales presentation. True professionals implement repeatable systems into their business and seek ways to improve them on a regular basis.

Let's review your sales presentations.

The first thing that you need to do is to redesign your presentation if this has not been done for a while. Think back to the first few presentations that you did and remember how meticulous you were. You did this because you really cared about doing a great job for the client and you wanted to make sure that the loan settled. Is that enthusiasm, energy and care still evident?

Here is a structure that works for many of the top producers that we work with. Check to see if you cover the following points in your sales presentations and make changes to suit your service proposition. These steps could take place over two meetings.

### Eight steps to a great presentation

1. **Greeting and introductions** – acknowledge everyone and the referrer/source that put you together.
2. **Set the agenda** – tell them what you would like to cover, how long these appointments normally take, that you'll be asking plenty of questions, and what you would like to achieve from the appointment. Ask what they would like to achieve.
3. **Your commercial** – why choose us! Outline your experience, unique service proposition (USP) and benefits of using your services and other services that you offer.
4. **Restate needs** discussed in the phone call between the two of you.
5. **Conduct further needs analysis** to understand
  - what they are looking for in the loan product
  - what is important about the lender
  - what they want from their broker
6. **Present solutions** to the needs identified starting with you (if possible). Some of our clients prefer to present the solutions in writing prior to a second appointment.
7. **Offer to complete the application** and outline the application to settlement process (provide it in writing).
8. **Introduce other services** that you offer.
9. **Introduce your referral program.**

Doug Mathlin is the founder of Front Runner Consulting Group, a sales training and sales management training company specialising in the development of mortgage broking businesses. Contact him at [dmathlin@frcg.com.au](mailto:dmathlin@frcg.com.au)

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