

Bernie De Souza®



THE UK'S NUMBER 1 EXECUTIVE COACH FOR FINANCIAL ADVISORS

1. Automatic Referrals

- How to create an automatic referral programme
- Learn the automatic referral system and how to implement it
- How to avoid cold calling ever again
- To identify potential referral partners
- To measure where, when, and how referrals come in
- To have the exact words to introduce new referral accounts
- To have the right words to ask for referrals without looking desperate
- How to have a busy diary bursting with quality leads
- How to increase referrals by understanding the personality of existing clients

2. Prospecting for New Clients

- How to build a prospect list when you have run out of your list.
- The exact words to use word-for-word for prospecting at social events, so we do not sound like a salesperson.
- How to get centres of influence to promote your services more easily.
- How to create a prospecting pipeline which converts into an ongoing income.
- Focusing on prospects who have the money to buy.
- How to prospect friends and family without sounding like a salesperson
- Two lunches a week with influencers as a prospecting strategy.
- Advanced prospecting techniques for professionals.
- How to make networking events work for you.
- What to say at breakfast clubs and organised networking events before, during and after.

3. Closing More Easily, with Soft Closing Skills

- Learn the exact words for closing without even selling
- To increase number of clients, with better closing ratios
- Close business deals and presentations easily
- Discover the five levels of closing
- How and when to close
- The Contrast principle on closing
- The Pride Principle on closing
- Negotiating from a strong position

4. Getting Appointments on the Phone – Without Rejection

- How to fill your diary with more appointments
- How to book more appointments on the phone
- How to develop instant rapport over the phone
- How to close without being pushy
- How to connect emotionally
- How to connect with busy people
- How to turn a No into a Yes
- Improve your results on the phone
- The exact scripts word for word
- Rejection free closes

5. Rapport - Building Solid Trust and Rapport in Seconds With Everyone You Communicate With

- Get your prospect to pick you in the first few seconds
- The exact words to connect with everyone you meet
- What prospects look for in people
- How to create an instant bond with prospects
- Why the back of the mind makes the rapport decision
- The visual trigger to create trust
- Using tone to relax the prospects
- Using speed to be congruent with prospects' expectations
- How long it takes for the rapport decision
- Creating instant belief

6. Networking Successfully to Create an Ongoing Prospect List

- How to maximise every networking opportunity
- How to avoid timewasters
- How to identify timewasters
- How to book a 1 to 1 without selling
- How to put together an elevator speech that works
- To know the exact words to use to build rapport
- How to deliver a 60 second magnetic presentation
- How to identify the 4 visual signs of the prospect
- How to understand people's buying styles without talking to them

7. First Meeting Programme Using the 15 Magic Words

- How to execute first meetings in less time, and leave with more information
- The 15 magic words that pre-close every presentation
- How to look organised and respectful of the client's time
- How to present effectively at short notice
- How to use the agenda effectively
- Increase your conversion rates
- How to keep the client's attention from start to finish
- To have a structure when presenting
- How to take total control of the meeting without being pushy

8. Time Management - How to Create More Time Whilst Being More Productive

- Getting more done in less time with one powerful proven technique
- Work / Life balance: making this a reality
- How to create more time whilst being effective
- How to use the Priority Management Table to maximise your daily activities
- How to prioritise the activities in order of urgency
- How to maximise your team performance in less time
- Squeeze more results out of each and every day
- How to deal with difficult people in less time
- Eliminate time wasting activities
- Improve skills of planning and prioritising
- Managing meetings effectively

9. Handling Objections – Turning a No into a Yes with the Prospect's Approval

- The agreement principle. How to stay in rapport without building up resistance
- Giving permission to the prospect to keep their objection
- Exact words to re-enter the conversation with the prospect's participation
- How to re-introduce new choices for the prospect
- Confirming the desired outcome with the prospect
- Getting a now decision instead of a "think it over" response

10. 60 Second Presentation – How to Confidently Deliver with No Notes

- How to have immediate impact
- How to connect with the audience
- How to put your message across without selling
- How to be confident when speaking
- The exact structure for every presentation
- To be interesting and get prospects to ask for more
- How to deliver without notes

11. Speaking in Public – To Deliver Presentations You're Proud Of

- Present with confidence
- What three things the audience are looking for from you
- The three visual signals of confidence when presenting
- How to remember a speech without notes
- To develop a framework for future speeches
- How to keep the audience's attention from start to finish
- To have a structure when presenting
- How to take total control of a room when presenting
- How to develop a PowerPoint presentation, with slides that work
- How to present effectively at short notice

12. The Secret Language – Learn the Secret Language of Our Prospects.

- Recognise why 3 out of 4 people don't believe you and how to fix it
- How to build instant rapport with just a few magic words
- How to get people to instantly understand you
- How to relate to all of the personality types so we are not pitching to clients but speaking their language, so they feel comfortable to engage with us
- How to motivate people into action by understanding which personality they are
- Learn the secret language of your prospects
- How to create ongoing rapport by understanding other personalities

13. Delegation – The Steps To Successful Delegation.

- Define the task
- Select who has the skills for the task
- Consider the resources required
- Work out the personality of the person doing the task
- Agree deadlines
- How to support and do progress reports
- Analyse the results and feedback

14. After Coaching Accountability - Measuring Results And Activity After Coaching

- Review and adjust activity
- Review and adjust results
- Review and adjust goals
- Re-cap on all skills taught
- Questions and answers on progress
- Coaching plan moving forward
- Accountability moving forward