MMI WHOLESALER WORKSHOP

MONEY MANAGEMENT INSTITUTE

NORTH POINTE PARTNERS

DECEMBER 16, 2019
VOYA INVESTMENT MANAGEMENT OFFICES

AGENDA

8:00 AM – 8:30 AM
Registration and Networking Breakfast

8:30 AM – 8:35 AM
Welcome and Opening Remarks

Arlen Oransky, Senior Vice President, Chief Membership and Programs Officer, Money Management Institute
Hank Schulthesz, Principal, North Pointe Partners

8:35 AM – 9:15 AM
The Changing Distribution Landscape
The financial services industry has undergone significant change over the past several years, and the pace of that change is accelerating. The causes are both varied and longer-term in nature. This opening segment highlights select shifts in the distribution landscape and how sales professionals must adapt their skills, processes, and disciplines to address those changes.

9:15 AM – 10:30 AM
Targeting Opportunity
A more intentional effort to a more targeted group of individuals is a hallmark of the new age in distribution. This segment highlights four potential pipelines for growth and the advantages and disadvantages of pursuing each. The challenge is identifying the profile criteria of advisors within each pipeline. Participants will engage in an exercise to determine quantitative and qualitative attributes that best decide the "fit" of advisors across a number of pipelines.

10:30 AM – 10:45 AM
Networking and Refreshment Break

10:45 AM – 12:00 PM
Preparation Disciplines
One of the most valuable and differentiating qualities in the new age of distribution is the discipline of preparation. Preparation encompasses more thorough advisor profiles as well as the need for much more dynamic meeting and call preparation. This segment offers a specific framework, timing, and templates to achieve both objectives more consistently. Participants will draft a preparation worksheet for a specific meeting or call type and then review insights gained and gaps identified in relation to current practices.

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12:00 PM – 1:00 PM
Networking Luncheon

1:00 PM – 2:30 PM
Sales Execution "Campaign" Planning
One of the dominant themes in distribution today is aligning the steps in the sales process to the advisor's or prospect's buying process. The "buyer's journey", as it is often referred to, has brought the need to more carefully consider the specific steps (meetings, calls, activities, and communications) required to move the advisor/prospect through the decision-making process with greater efficiency and intent. The application of a "campaign" framework can help sales professionals move targeted opportunities through the process successfully. In this segment, participants will outline a "campaign" plan aligned to a target group of advisors, including pre-contact and post-contact considerations, and then reconvene to share learnings and pain points.

2:30 PM – 2:45 PM
Networking and Refreshment Break

2:45 PM – 4:00 PM
The Operating System for Wholesaling
Managing the multiple systems required for sustained success in wholesaling takes more than hard work, it takes repeatable systems and the discipline to follow them. Territory coverage, scheduling, preparation, and team communication all lend themselves to the benefits of an "operating system." Time management and organization is ultimately a personal discipline. Regardless of your preferences, there are well-researched disciplines in organizing select routines to accomplish a wider range of priorities, more consistently. Participants will discuss how to align their priorities for the next day/week/month with the topics addressed in the Workshop and the changing dynamics of a new age in distribution as reference points.

4:00 PM – 4:15 PM
Takeaways and Next Steps
The final session is a catalyst – not an outcome. Participants will specifically identify what they wish to implement from the program and the immediate steps they are committed to taking in the first few weeks following the Workshop.