

2 DAY Program*

2022

Consultative Selling and Negotiations

March 29-30, 2022 Kansas City, MO

July 20-21, 2022 New York, NY

October 2022 Scottsdale, AZ



Consultative Selling and Negotiations



WSIA joins with Richardson, a global sales training and performance company, to produce Consultative Selling and Negotiations via videoconference on April 28, May 3 and 5. This three-day program focuses on expectations in transactional relationships, styles of selling and negotiating, and offers insight into individual strategies and habits.

This program is not about hard sales tactics. It prepares you to develop relationships which puts the focus on your customer rather than you; strong relationships are based on continuous transactions rather than a single point in time.

WHO should attend

All brokers, managing general agents and underwriters who transact business. This program is most beneficial to those E&S professionals who have relationships with clients. They will gain a greater understanding of clients' needs and perspectives in a sales and negotiation process.

Training Geared toward Business Transaction

Learn the basics

There is a difference between selling and negotiating, and there is an appropriate time to do both. Some foundational basics discussed are:

- Sales styles and approaches
- Framework for sales and negotiations
- Negotiation tactics

Seriously prepare yourself

Preparing yourself for the sale and negotiation process is key to a successful transaction. How you prepare affects your sales. Acquire tips to:

- Know your product
- Create your value proposition
- Develop measurable and short-term objectives

Focus on your customer

It's important to stay focused on the customer rather than yourself or your company. Subject material covers:

- Customer's objections and steps to resolutions
- Real-life examples and exercises

WHAT to expect

- Richardson has converted the two-day in-person program into a facilitated virtual learning three-day experience.
- Richardson experts and sales trainers lead presentations and discussions on skills and strategies to change behavior and win in a selling environment.

Communicate throughout process

Dialogue is needed every step of selling and negotiating. How do you do this? This course provides an in-depth discussion of:

- Steps to open dialogue
- Nonverbal vs. verbal communication
- Solution dialogue
- Negotiation dialogue
- Selling and negotiating examples and exercises

Evaluate yourself

After this program you will be better positioned to self-reflect, self-assess and develop your own action plan designed to enhance your success.

WHEN & WHERE

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REGISTRATION & COST

- Tuition is \$1,095 per participant
- Program schedule is posted and available on the Consultative Selling and Negotiations webpage at www.wsia.org

"Rarely do I come out of a seminar or class feeling completely empowered and ready to use what I have learned, but this was not your everyday class. The class certainly paid off for me and gave me some great knowledge that I will use for the rest of my life."

- MARK EISENMANN, AMWINS

"This program is focused, going in depth on the **full sales experience**, **building relationships** from the ground up, and the Richardson presenter is very dynamic and interesting... Really gives you the **confidence** and the **knowledge** to try a cold call."

— WHITNEY POMEROY, CAPSPECIALTY

WSIA TECHNICAL & CAREER DEVELOPMENT

Surplus Lines Compliance For insurance professionals

seeking an introduction to regulatory compliance

Surplus Lines FundamentalsFor insurance professionals
seeking an introduction to E&S

Underwriting Boot Camp

······INTRODUCTORY ······ INTERMEDIATE

For underwriters with single-line experience or employees in a technical role seeking to move into an underwriting role in the future

Marcus Payne Advanced E&S

For E&S professionals with 5-15 years of insurance experience to strengthen their surplus lines knowledge

Surplus Lines Management

For professionals transitioning into leading teams while still responsible for their own book of business

Offered at Emory University's Goizueta School of Business in Atlanta, GA

Excess & Surplus Lines

For professionals early in their careers to gain understanding of broker/carrier relationships and how surplus lines works in the marketplace

Consultative Selling

and Negotiations For any surplus lines

For any surplus lines professional who transacts business and has relationships with clients

Effective Coaching

For surplus lines professionals responsible for a team to receive customized coaching training

EXPERIENCED

Executive Leadership Summit

For E&S senior-level professionals developing and implementing strategic planning, leadership and management change

Offered at University of Virginia's Darden School of Business in Washington, D.C. area

WSIA University

Designed to improve technical underwriting competency and develop networking relationships with peers

ALL LEVELS

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WSIA

wsia.org