Wholesaler Checklist for Success

- Write user-friendly business plan (annual or quarterly)
- Create focused, segmented advisor opportunity lists (Top 100, 50 Prospect, etc.)
- Create and adhere to succinct and tight rotations
- Define scheduling roles and responsibilities with internal/scheduler
- Commit to pre-meeting advisor recon system (prospects and existing clients)
- Send pre-meeting agenda 3 to 5 business days in advance
- Establish 3 to 5 key discovery questions re advisor's practice, personal, etc.
- Utilize *Advisor Data Sheets* to stay organized
- Relentlessly refine your *PVP-Peerless Value Proposition®*
- Present agenda to advisor and follow topics during meeting
- Listen actively and attentively - ask follow up questions
- Trial close to ensure clarity of your message
- Move the sales process forward - end with product/next step 'up-tick'
- Intentionally forward schedule the next appointment
- Implement instant post appointment email touch with advisor
- Dictate CRM notes *before* driving away
- Commit to sixty-second post appointment self-critique
- Construct and implement a systematized appointment follow-up process
- Create money in motion 'hot list' to follow up on
- Ensure organized literature and trinket trunk
- Memorialize daily 'must do' list (calls, emails, expenses, CRM input, etc.)
- Have daily call list (name + number) prepared in advance and loaded into Evernote
- Connect with COIs on planned and regular basis
- Schedule weekly, agenda driven calls with internal partner and team
- Create marketing calendar to formalize presence in your absence
- Learn and use technology for better organizational and process success
- Be home when you are home
- Take time off to recharge

Wholesaler Masterminds®

WHERE GOOD WHOLESALERS BECOME GREAT WHOLESALERS

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