

4 secrets

to financial services cross-selling success

COMFORTABLE CUSTOMER CONNECTIONS
BELIEF IN THE VALUE
CONFIDENT SUGGESTIONS
GRATIFYING RESULTS

At Brokers Central, we understand that cross-selling at financial institutions doesn't just happen!

Our training program empowers your team to speak with customers confidently while focusing on the customer relationship, not the product. We realize establishing the connection and building trust is the cornerstone to success.

To help you succeed, we provide onsite training for customer-facing employees, which includes:

CUSTOMER PROTECTION IQ

- Insurance products & uses
- Customer assessment and needs analysis
- Life stages and how to recognize them
- Sales concepts and presentations
- Quoting and submitting business

CONSULTATIVE SALES IQ

- Clues to initiating a conversation
- Taking the "sell" out of cross-selling
- Matching customer needs to product selection
- How to respond when the customer says "no"
- Continuous relationship building
- What to do when the customer says "yes"

COUNT ON US FOR:

ANNUITIES

DISABILITY INSURANCE

LIFE INSURANCE

LONG-TERM CARE INSURANCE

We will work with
your branch leaders
and team members
to every support
needed for success.

To learn more about our
unique approach to training:



Call **845-495-5000**

Visit WWW.BROKERSCENTRAL.COM

Email INFO@BROKERSCENTRAL.COM