

Communicating to Engage

An important realization for sales professionals today is that successful communication is not merely having the individual listen to you, but engage with you — joining in the conversation, asking questions and offering their own thoughts and insights.

You can build more concise and compelling communications that raise the level of engagement consistently through the use of a simple framework.

Guidelines to get you started:

Have a Point

- This is the single most important first step. Without a clear point virtually anything you know about a topic or solution is fair game for inclusion leading to the sharing of far too much information to digest and apply! Deciding on the clear point for your communication may be the most difficult step in the entire process!

Have a Framework

- Address the four questions:
 1. Why, when or to whom is this important?
 2. What is your solution or the benefit of your solution?
 3. What facts or evidence support your message?
 4. What happens next...how do we act on this information?
- These questions are a framework for preparing your remarks. Stating the questions within your remarks can aid the listener in organizing the message by helping differentiate the information shared.

Address the “Why”

- If there is no need, there is no decision! The biggest opportunity for elevating impact and engagement is to more powerfully address the first question...why is this important? When is this important? To whom is this important? Why me? Why now? Without the listener acknowledging that there is a need, engagement is weakened, and decision making is greatly slowed.

Support your Statements with Facts

- A statement that is supported by a data point is almost always more powerful than the statement on its own. Build your story and talking points around 2 to 3 strong data points.

State the Impact or Benefit of Your Solution

- This question poses the fewest problems; yet, the details of your product are less compelling to the listener than the benefits or impact it provides. Remember there are only three things your solution can do...fill a gap, compliment an existing solution or replace an underperforming solution. The better you become at positioning your product in one of those three areas, the more likely it is that an advisor will reach a decision.

The “Close” Must Center on What you Believe

- Wholesalers need to be more powerful at addressing “what happens next”. What do you believe they should do? Without an opinion, a belief, a point of view...you are leaving the decision entirely up to the advisor. But you are not neutral...you believe something...share your belief!
- Simply telling an advisor to use your solution can be awkward. Talk instead about the details or demographics of the clients your solution might benefit...their age, stage of life, portfolio size, greatest source of worry. This is a much more compelling and also a more comfortable way to answer the question of “how do we act of this information?” Remember that advisors spend the greatest percentage of their time thinking about the people they serve! So help them see the people who will benefit from their decision.

Write, Rehearse and then Refine your Talking Points

- Draft your major talking points and supporting statements first and then review to see how well they address the four engagement questions. Time spent in developing prepared talking points and the small edits that follow are powerful.

Engage Both the Left and Right Brain

- Powerful communications engage both the left and the right brain. The left brain focuses on the logic of the message (your statements supported by data). The right brain focuses on the emotions and imagery of the idea (this is why the use of visuals and stories is so important to today’s listener).

Prepare Questions and Prepare for Objections

- Finally, consider both the potential questions and objections from the advisor, as well as preparing one or two questions for the advisor. Sales efforts can go awry when the first raised objection by the advisor is dreaded but not prepared for resulting in a halting, less compelling and less fluid response.
- Questions for the advisor embedded in your talking points fosters a more rapid engagement of the advisor in the conversation. And please craft something more interesting and more engaging than “does that make sense?” or “do you agree?”

Compelling, well-crafted communications are powerful...but not easy to master. It takes time and practice, then it takes editing and revision - and then more practice. You can find a more detailed version of these guidelines in the [North Pointe Partner blog article](#).

Worksheet: Message Development

What is the main point you are trying to convey?

Why, when or to whom is this important?

What facts or data support your statement?

What is the solution? What is the impact or benefit of the solution?

What facts or data support your statement?

What do you *believe* should be done? How do we act of this information?



Worksheet: Message Development

Supporting Visuals

Story or Metaphor

Potential Objection

Response

Potential Objection

Response