

MODULE #	VIDEO TITLE (Duration)	EXERCISE	WORK BOOK PAGE #
	Overview (00:04:14)		
1	Introduction: Selling Is Like Flying (The Wedge Objective) (00:07:16)	Watch video and then read Wedge Objectives and Strategies (Page 1)	1
2	How Is Your Practice Better? (00:00:32)	Answer the Questions: What makes you different; What makes you better? What do you have to sell? Use the grid on page 2 for your answers.	2
3	Survey Results (00:01:16)	Mark your results in the grid on page 2 with yellow=same as your competitor, green = unique.	3
4	3 Major Components of Business (00:02:29)	Write a list = Name 8 parts of a car. Write another list = Name 8 pro-active services. Why is it easier to name 8 parts of a car than to name 8 pro-active services = because parts of a car are tangible; they have a name.	4
4	3 Major Components of Business	Of the service work that you do how much of it is well-defined and preplanned on the calendar for the next 3/6/9/123 months versus how much of it is reacting/responding to putting out fires/responding to needs/giving reactive service? Of our competitors, who would not do the same reactive services that we do?	4
5	Locating Your Prospect's Hidden Pain (00:12:52)	Put on the hat of a buyer and start to think through what are chronic needs that for them are unmet? Here are some examples: <ul style="list-style-type: none"> • How much money do I need for retirement? • What is the impact on my return? • With over 30,000 choices, how did they get down to these recommendations? What are some other conditions that our prospects have accepted to live with and tolerate, but wish it were different?	5
6	What Motivates People? (00:02:00)	-	6
7	Ladder of Abstraction: Dairy (00:08:41)	Do you have anything that's truly unique? If so, what is it?	7
8	Differentiate (00:04:08)	-	7
9	Know Your Competition (00:02:33)	Use the grids on pages 8-14 to list your existing pro-active services and to create new ones that will enable you to win more business from your competition. Insert your firm and your formidable competitors in the grid and list your pro-active services ranking them from 0-10. Are you pleased with how much you know about yourself and your competition or are you surprised how little you know about your company and potential competitors?	8-14
10	Developing Your Pre-Call Strategy	Following the video, run through the pre-call strategy	15

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	(00:03:00)	<p>worksheet again and complete it: Fill in prospect name Buyers names, title and buyer type (people who can influence the buy) Outside influences/intro (how do you get in /leverage, referral, form a relationship) Who's got the business today? Incumbent (How long?) How much commission is in it? \$ Revenue</p> <p>It's what you do, that the incumbent doesn't do, is where the incumbent is being underserved. Do you agree with me on that?</p> <p>Then if they (prospect) has that incumbent – why do they need you? What do you believe makes you better?</p>	
11	Knowledge is Power (00:10:08)	What is it you know/don't know? What do you need to go learn? Give 2-3 bullet points – What are the 2-3 things you need to study to make you more successful as a sales person?	16
11	Games and Zones	<p>How big a game are you playing? Big/Medium/Small Where are you now? Where would you like to be? What has to happen to get there? What resources, habits and skills do you need to make that happen?</p>	17
12	Rules of The Wedge (00:05:52)	-	18
13	The Wedge Process: 5 Step Overview (00:06:08)	Follow along with the Wedge Process overview on pages 19-20 – no exercise.	19-20
14	The Wedge Process: The Beginning Steps - Fishnet Questions (00:06:23)	-	21
15	The Wedge Process: The Beginning Steps - Qualifying Questions (00:4:44)	-	21, 43
16	The Wedge Process: Picture Perfect (00:05:15)	<p>Memorize Picture Perfect Recipe Card (handout): Comprehensive Financial Plan, practice it and if possible role play it with a partner (3-5 times)</p> <p>Memorize Picture Perfect Recipe Card (handout): Rebalance Portfolio, practice it and if possible role play it with a partner (3-5 times)</p>	22, 39-41 Handouts
17	The Wedge Process: Demonstrating Picture Perfect (00:02:44)	<p>Remember: Ingredients must be tangible, i.e. a document Make sure to say “and they” not “did they” – it prevents the buyer from getting defensive. Practice writing your own Picture Perfect Wedges.</p>	23 Handouts
18	The Wedge Process: Take Away	<p>Role play Take Away to get used to it. Remember the steps of the Take Away: 1 ¼ second pause before you say anything</p>	24

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		A little bit of a shrug / a bit of a look on the face Make sure your voice goes down (statement), not up which indicates a question.	
	The Wedge Process: Shelf and Transition (00:04:01)	Review concepts of putting it on the shelf, when and how. Practice and role play (if possible) from Picture Perfect to Take Away – Comprehensive Financial Plan and Rebalance Portfolio.	25
19	The Wedge Process Map (00:05:30)	Follow along and complete Wedge Sales Process Worksheet (handout): Rapport to 2 nd Take Away Review and memorize: Rapport to 2 nd Take Away	The Wedge Sales Process Handout
20	The Wedge Sales Call (00:02:53)	Roleplay with a partner if possible: Rapport to 2 nd Take Away Wedge process on pages 19-20 Wedge process script on pages 29-30	19-20 29-30 Handout
21	The Wedge Process: Gestalt, Transition and Vision Box (00:08:41)	Partner up and create a vision box for each of you, by asking the other about their ideal vacation. You'll have 15 minutes. After that time each of you should have a vision box for the other person's ideal vacation that you should be able to book without going back to ask further questions – remember at the end of this they should have a concrete and specific deliverable – the other person's ideal vacation! Get all the details – if you don't know what they want, how are you going to bring it to them? Your goal is to do this exercise without using your notes. Once you feel you have enough information to go book the ideal vacation, give your vision box to someone who was not on your team. Then pretend to be the airline so they can book the ideal vacation (role play). Vision box needs to be in the 'third person'.	25-26
22	The Wedge Process: Replay (00:04:29)	Here is what I am hearing you say you want... Am I on track? Here is what else I am hearing you say you want... anything else?	28
23	The Wedge Process: Whiteflag (00:05:45)	Complete Wedge Sales Process Worksheet (handout): Vision Box to White Flag Review and Memorize: Rapport to White Flag Role play if possible (2-3 times).	28, 29, 30
24	Rehearsal Rules (00:08:29)	Review and Memorize: Rehearsal Steps Role play if possible (2-3 times).	31-32
25	Rehearsal Steps	Role Play: Rapport to Rehearsal (up to 6 times)	
26	The Wedge Process Map	Complete Wedge Sales Process Worksheet (handout): Complete All Steps	
27	Coast to Coast	Complete role play Coast to Coast	
		OPTIONAL EXERCISES:	
		Write, Review and Improve: Picture Perfect Wedge	Addendum Page 40-41
		Write Qualifying Question and Vision Box for Picture Perfect Wedge	Addendum Page 43