

# Best Practices For Sales Desks In Today's Environment



## Best Practices

### Six Roles of Internal Wholesaler

- Establish the maximum amount of time a day an internal spends on administrative support.
- Arm internals with technical knowledge (beyond what on your web site) and skills.
- Establish core advisor profiling and inputting requirements.
- Develop coordinated internal / external touchpoint strategies based on advisor profitability.
- Track sales results from advisors supported by internals only.
- Establish targeting criteria for external wholesaler relationships (so internals know what to look for).
- Decide which roles you want your internals to play.
- Balance time commitments.

### Measurement Quality

- Define and track quality conversations.
- Provide on-going coaching around quality.
- Raise the quality bar for experienced internals – and coach to that.

### Sales Desk Model

- Clearly define what roles internals will play and how they will allot their time.
- Measure quality and well as quantity.
- Provide on-going coaching and skill development.
- Provide a career path.



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Founded in 1994 by Mary Anne Doggett and Claudia Fogelin, Interactive Communications, Inc. is a sales consulting firm that seeks to advance the way financial services firms design, build, and increase the effectiveness their distribution organization.

By providing consulting, training and coaching, they help their clients increase sales results, retain top talent, and capture today's opportunities while at the same time preparing for future trends.

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