



**10 TIPS
FOR CLOSING
MORE SALES
VIRTUALLY**

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The concept of selling is the same whether it's virtually or in person. So why is it so much harder to do it online? Here are 10 proven ways to increase your closing ratio and compete better in a virtual environment.

1 SET AN EXPECTATION
Think of setting an expectation as having an upfront contract for your online meetings. Whether it's a seminar, a presentation or a meeting with a prospect, have an agenda that clearly communicates what is going to happen in the meeting and what's not going to happen. Setting expectations helps prospects know that their time will be well spent with you and it lets

them know what they should come prepared with. When expectations are met, this also builds trust, which can make all the difference in turning prospects into long-term clients.

2 GET TO THE PAIN POINT
Identify your prospects' unique pain points and keep your conversation relevant to those pain points. If prospects aren't experiencing pain that can be alleviated

by your products or services, there is no sales opportunity to pursue. On the other hand, if there is pain that your services address, and you can help your prospects connect unique elements of your products or services to specific aspects of their pain, they will be more likely to come on as clients.

3 SAY THINGS IN THE THIRD PERSON
When holding those initial meetings, it can be awkward to ask some of the more candid questions about pain points. A helpful solution to this is to talk about things in the third person. One common example would be mentioning "other clients" who have a particular pain or challenge in order to get the prospect to consider if the situation applies to them too. This can be a gentler way of approaching difficult subjects, rather than asking directly if "you" have this problem or if a certain situation applies to "you."

4 ASK THE RIGHT QUESTIONS
Being prepared with the right questions is a critical step in getting to the full scope of a prospect's pain and building trust that you have the solutions. Even the most seasoned advisors shouldn't leave this step to memory or experience alone. Using a questionnaire or fact-finder is the most effective way to know you have all the right questions and that you aren't going to forget any of them. Asking questions at the right times can be equally as important as asking the right questions. So, make sure your fact-finder follows a progressive order in which each question builds





off the next and helps the flow of the conversation.

5 DON'T SKIP QUESTIONS

A good fact-finder will not require that all of your questions get answered in the first meeting. If you find yourself running out of time with a prospect, don't skip questions in order to rush through everything. Skipping questions can lead to misjudgments in planning opportunities or selling before you have the full picture. As part of your expectation setting with prospects, you could let them know up front that it could take two meetings to ask all your questions. This shows competence more than anything else, and a commitment to giving them the best advice possible.

6 USE PARTICIPATION

Virtual meetings can be distracting. You should expect not to have the same undivided attention as you would in an in-person setting. You can use different forms of participation to keep people en-

gaged, and to help them retain what you are telling them. If you're in a prospect meeting, go a step further than sharing your screen and use a virtual whiteboard to draw visuals or write things down in real time. If you are hosting a sales seminar, post periodic surveys throughout the presentation to make attendees self-rate themselves and their needs in the context of your services. This is a proven way to book more follow-up calls.

7 SHARE DOCUMENTS VIRTUALLY

Invest some time into really learning your chosen virtual platform – whether it's Zoom or something else. Make sure you know how to share screens seamlessly and have important documents ready to show throughout your conversations. Virtual sharing also applies to follow-up documents and contracts. Learn how to use electronic signature and sharing services in order to keep up momentum and make things easier for your prospective clients.

8 STOP SHARING YOUR SCREEN

As important as participation is, you still want to simulate the connection of an in-person meeting as much as possible. Remember to periodically stop sharing your screen and put the focus back on the prospect and the conversation. When you leave a document or visual up beyond the point at which you're discussing it, chances are you and your prospect are still looking at that visual rather than at each other. Just because you're not face to face, doesn't mean you don't still need that face-to-face.

9 FOLLOW UP!

If you haven't already scheduled a follow-up meeting – or if even if you have – follow up with your prospects to recap what you've discussed so far, share any documents and set expectations for next steps. One of the great things about being in a virtual environment is how much it's forced us all to get more tech savvy. Create more personal follow-ups with tools like



BombBomb that make it seamless to record and share short videos in your prospect communications. That personal touch could make all the difference in converting prospects into clients.

10 HAVE A PROCESS! Having a successful process starts with considering your own experiences and successes and then documenting them into a repeatable system that will help make your business run more efficiently – from that first call and through all your future interac-

tions with a prospect. A documented process, with a name and clearly defined steps, not only differentiates your business from other advisors' businesses, it also helps your prospects understand the path you're taking them on and the progress they're going to make as you take them through it.

Don't have a documented planning process or a resilient fact-finder process? Need additional tips for closing more sales virtually? C2P Enterprises can help. Built by advisors, for advisors, C2P Enterprises simplifies the financial planning process for advisors and their clients. To find out more about how we can help you grow your business, [click here](#) to schedule a call with us today.



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