



The “Be Memorable” Formula

Why and how to build a memorable sales experience

When you pursue high-value prospects in competitive markets, your sales process—from the very first phone call through the signing of the contract—is your opportunity to set yourself apart from the competition. If you talk and behave like every other advisor in the market, you will fade into the sea of static instead of closing the big accounts you need to fuel exponential growth.

These are the common characteristics of high-value prospects that your sales process needs to address:

- They already work with an advisor and likely believe their current solution is adequate.
- They regularly receive calls and pitches from your competitors.
- When they take appointments with advisors, the sales conversations are largely the same.

In our work, we consistently see a common thread: The advisors who can tell a compelling story—one that is different and memorable—close more business with their ideal prospects.

When we work with clients, we call this “storyboarding,” which is our way of describing the process we use to craft a compelling message that helps us breakthrough screens and set first appointments with the right prospects. For you, whether or not you work with us, understanding why this approach is impactful and how to do it in your own business is critical to your growth.

The Airport Story

In *Pitch Anything*, Oren Klaff tells the story of his biggest pitch of all time. A professional fundraiser, Klaff claims to have raised over \$2 billion in his career, and the opportunity to be one of the lead partners in the revitalization of a private California airport represents \$1 billion of that high score.

Going into the pitch with the developer, Klaff faced competitors who had out-pitched his firm in the past. They were larger, more experienced, and had long lists of successful deals to trot out to prospects. At first glance, Klaff’s firm looked like the runt going up against two big dogs of the industry. Klaff had less clout, fewer resources, and lacked the prestige of a gigantic international firm.

But his pitch was far more memorable.

Where his competitors belabored slide after slide of financial data and analysis of the airport's profit potential, Klaff painted a vision of "American Legacy" to his prospects, telling stories about the airport's role in World War II and even bringing in a local auto mechanic who used to play touch football in a neighboring field as a young boy.

"The advisors who can tell a compelling story close more business with their ideal prospects."

Where his competitors fumbled with a projector and read from their PowerPoint bullets, Klaff used beautiful, printed posters, each expertly designed to reflect the vision of American legacy he wanted his prospects to experience.

Where his competitors used phrases like "we'd love the chance to work with you," Klaff outlined points that would disqualify his prospect from working with his firm—if the prospect wasn't as invested in doing right by the community as he was, they simply weren't a good fit, for example.

Klaff designed his pitch to be deliberately different, betting big on engagement to help him stand out and overcome the momentum of larger, more established competitors. His approach was bold and daring, and that was the point. If he played the game each one of his competitors was playing, he would have lost. Instead, he played his own game and scored the biggest deal of the career, earning his firm a \$1 billion contract and himself a multi-million-dollar payday.

What Klaff did was built a new sandbox with his pitch and laid the groundwork for what that experience would be if his prospects bought-in. That sandbox had the allure of exclusivity, of being new and different, and having a gatekeeper (Klaff) who was willing to challenge his prospects to truly commit to the sandbox "rules" in order for that experience to keep going beyond the sale.

Your Deliberate Difference

If we reverse engineer what made Klaff's pitch compelling and effective, we come away with the following lessons:

- **Anticipate how your competitors sell, and plan accordingly.** The industry we are in may be growing, but you can likely name your biggest competitors. You have probably pitched their clients, and they have pitched yours. Talk to your network to learn about their processes and look at their online materials to see how they position themselves. Good, now you know that you need to do something different from that.
- **Start with an emotionally compelling story and save service details for later.** The nitty gritty of factors like rates and returns and investment strategies matter, but they are unlikely to be the

linchpins that convince a prospect to part ways with their current advisor. Lead with a story about what makes you unique that resonates with the emotions of your prospect. Perhaps the majority of your clients are manufacturers because your grandfather worked in a factory or perhaps you have an insightful story about how a small business survived a recession because of your foresight.

- **Double-down on what makes you memorable by weaving that message throughout your business.** The sales process is a small sliver of your potential interactions with a prospect. If you make the decision to position yourself in a particular way, apply that thinking to the whole of your business. Update your website, redo your collateral, train your staff to adopt the new approach, and redo your entire brand—from the logo down to the business cards—if you have to. When you tell a compelling story in the sale, each touchpoint that follows should feel like the same story.
- **Treat a sale like a mutual interview, which means being willing to walk away.** There are a wealth of reasons as to why you should be willing to walk away from a prospect—avoiding problem clients, maintaining a specialty, strictly pursuing a specific client size—but in the sale, being explicit about finding the right fit sets a powerful tone. You aren't begging for their business. You are approaching them as a peer, and you are willing to walk away if the opportunity isn't right for either of you. This shift can seem subtle, but it informs every interaction between you and the prospect moving forward.

These key points, when executed properly, come together to create a memorable sales experience for the prospect. Being memorable—in a positive way, of course—primes your prospect to reflect more deeply on what you said in your meeting and will likely stimulate conversations about what you said and what you did. A standard brochure with a few stock photos and your logo is easy for a prospect to discard, but an impactful conversation lingers. Your prospect comes back to the memory to think about it, and each time they look at the part of their work that you would impact, they will think of you.

“When you are memorable, you get the second and third consideration.”

When you are memorable, you get the second and third consideration from a prospect. That might mean an immediate second appointment on the calendar or a call six months later that begins with the prospect saying, “You know, I was thinking about our conversation...”

From Principles to Practice

Being different or standing out can be difficult to do and may even come with growing pains as you challenge yourself to step outside of your comfort zone. However, the rewards of working through the process of experimenting and refining your new sales approach are significant. Not only can you hook

prospects where your competitors fail, but you can build a reputation in your space for being a standout voice, giving you a unique kind of momentum that begins with your sales conversation and spreads out across all of your potential prospects.

About the Author



John Pojeta is Vice President of Business Development at the PT Services Group (www.theptservicesgroup.com), where he initiates and manages strategic, corporate-level relationships. Previously, he owned and operated an Ameriprise Financial Services franchise for 16 years. For more information, email him at john@theptservicesgroup.com.

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