

32. Qualifying Target Accounts

Time: 2 Hours

Who: Business Development Manager and / or Senior Producer

Where: RHSB Dallas or Ft. Worth

Overview

The purpose of this activity is for the new Producer to improve their odds of winning new business opportunities

Objectives

As a result of this activity, the Producer will be able to better spend their time working on the right type of prospect.

Steps

1. Emphasize how the producer's ability to spend his / her time working on the right opportunities will have a significant impact on his / her performance
2. Review the Target Account Assessment Criteria introduced during the IMPAX Process Workshop
3. Review RHSB value proposition – vertical alignment, is this a market fit, do we have the bandwidth, carriers, typical size clients, etc.
4. Review IMPAX process factors – quality of information, do we have a coach, strength of gatekeepers, philosophical fit
5. Discuss possible strategies and action steps for dealing with areas where the assessment reveals that you have information gaps or need to improve your position.
6. Review prospect list

Materials

- Target Account Assessment Criteria

Follow-Up

- Have new producer complete Target Account Assessments on several of the new accounts on their sales plan and discuss