



# Workshop Guide

*for*

# Wholesalers



**CAPTIVATE YOUR TEAM**  
**MOTIVATE THEM TO BELIEVE**  
**INSPIRE THEM TO SUCCEED**  
**COMPEL THEM TO ACT**



## WHOLESALE WORKSHOP GUIDE

*At Don Connelly & Associates we understand that top performance doesn't happen by accident, rather by careful design. Our Founder & CEO, Don Connelly, has long been an inspiring partner, trainer, advocate and mentor to thousands of Financial Professionals. With a career spanning more than 45 years in the Financial Services industry, Don Connelly has been a beacon of wisdom, authority and common sense. These dynamic and compelling workshops give Wholesalers easily implemented, practical tools and ideas that will make an immediate impact on their success. Don is a master at training Wholesalers on how to attract Advisors, and strengthen client relationships; and at providing Wholesalers with the immediate tools they need to grow their businesses. Workshops can be scheduled on-site or on-line. The following are three popular workshops.*

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### **‘Be Brilliant at the Basics: A Repeatable Process for Peak Performance’**

*‘A Repeatable Process for Peak Performance’* is a thorough examination of both the hard skills and the soft skills needed to excel. The purpose is to give Wholesalers a process or processes they can depend upon through all types of markets, good and bad. At first glimpse, it appears that top Wholesalers have some sort of innate talent that propels them to the top; when, in fact, their success is actually due to years of deliberate practice and repeatable performance. They set goals, prospect, get appointments and nurture relationships day in and day out. By creating a failsafe repeatable process, they eliminate slumps, as well as the need to be always reacting to changing market conditions. They know how to get appointments and how to conduct meetings and conversations with Advisors that help add value to the Advisor's business. They understand how to differentiate themselves from Wholesalers who simply push product. Wholesalers are shown how to use their hard skills to perform the tasks associated with the job; and how to use their soft skills to build relationships and influence Advisors. For Wholesalers who don't embrace a deliberate and repeatable mindset, their time gets stolen. Running the business always gets in the way of growing the business.

*‘A Repeatable Process for Peak Performance’* is for those Wholesalers who understand they are running a valuable business. They have made the decision to become great and want to know the best path to follow. They want to learn how to become excellent by doing the ordinary things extraordinarily well.



#### **Testimonials**

*“Your session is a huge wake-up call to get back to perfecting the basics”*

*“Inspired me to achieve higher success”*

*“Pearls of wisdom from years of experience”*

*“Great tools that are applicable to my business”*

Coco Chanel said, *“In order to be irreplaceable, one must always be different.”*

Wholesaling has become commoditized. All Wholesalers chase the same Advisors with the same successes and the same failures. Wholesalers are now more alike than different. It is difficult for a Wholesaler to be successful when he or she is doing exactly what everyone else is doing. Being different is more important than ever. And it’s not hard skills that separate Wholesalers from the crowd. It’s soft skills. It’s not IQ. It’s EQ.

Soft skills are those inter-personal skills which account for at least 90% of a Wholesaler’s success. To a top tier Wholesaler, EQ is more important than IQ. This lively and interactive workshop focuses on using one’s soft skills to reach one’s full potential and to escape the stigma of me-too thinking which has infiltrated our industry.

In this workshop, Don emphasizes relationship building skills, self-management skills and verbal skills.

Wholesalers in this workshop will learn what it means to care more than Advisors expect them to care. They will practice putting their often complicated message in simple, easy-to-understand English. They will become versed in techniques of self-motivation. More importantly they will learn how to become a competent, likeable, respected and valuable asset to their Advisors – a *distinctly different* Wholesaler.



### Testimonials

*“Perfect use of the day!”*

*“Extremely Valuable. Needed this one recorded on DVD”*

*“Great ideas for us to grow our business practices”*

*“Exceptional. I’ll use these ideas immediately.”*

*“Awesome insight. His analysis was awesome.”*

Wholesalers love this storytelling workshop – a soft skills session focused on verbal competence.

Every great Wholesaler is a transcendent communicator. Advisors respond to Wholesalers who make themselves easily understood and ones who give them great stories to use with their current and prospective clients.

This valuable session is a thorough examination of what psychologist Robert Sternberg calls *practical knowledge*: knowing what to say to whom, knowing when to say it, and knowing how to say it to maximum effect.

Under Don’s tutelage, each Wholesaler will create and commit to paper the stories, analogies and power phrases Advisors want to hear before they are ready to pay full attention to what the Wholesaler has to offer: Who are you? What’s in it for you? What are your qualities? What can you do for me that other Wholesalers can’t? Why should I do business with you? Additionally, Wholesalers walk out armed and confident with great stories and analogies they can use to help Advisors become more effective when communicating with their own clients.



## Testimonials

*“Awesome speaker, very entertaining, stories I will us from now on”*

*“Absolutely phenomenal! Inspiring!”*

*“Dynamite!”*

*“Absolutely great stuff. I needed this section of the conference.”*

*“The best! Great, great stuff!”*

*“The vernacular was fantastic. I got 2 ideas that I have heard from other coaches . . . but they resonated from Don”*

### Additional Details:

**On-Site Workshops:** two to four hours in duration - can be adjusted to meet requests

**On-line Clinics:** four 60 minute sessions

**Pricing:** fee + travel expenses, please call to discuss

**Contact:** 941-346-1166

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[www.donconnelly.com/services/](http://www.donconnelly.com/services/)



<http://www.youtube.com/watch?v=v3MJRTC0uuY>

**CAPTIVATE ~ MOTIVATE ~ INSPIRE ~ COMPEL**



## ABOUT DON CONNELLY

Don Connelly is perhaps the financial industry's most successful speaker, storyteller, motivator and mentor to financial professionals. His career on Wall Street spans more than 45 years and includes positions as a Stock Broker, Financial Planner, Branch Manager, Wholesaler, National Sales Manager and for nearly 19 years, Company Spokesperson, Senior V. P. and Senior Marketing Officer for an internationally renowned money management firm.

Don has lectured to tens of thousands of investors and financial services professionals in large cities, small towns, boardrooms, and universities. Audiences at England's Cambridge University, Harvard, Wharton School of Business, Chapman College and Pepperdine have all benefited from his presentations. He's shared his wisdom with Investment professionals abroad in New Zealand, Australia, Spain, Canada, England, Ireland and South Korea. In the past few years, he has given several presentations to the prestigious Million Dollar Roundtable as both a main platform and workshop speaker.

As founder and CEO of **DON CONNELLY 24/7** ([www.donconnelly247.com](http://www.donconnelly247.com)), Don's timely and provocative sales ideas are offered through an extraordinary learning center and mentoring program available to financial professionals 24/7. Don is a guru on managing client relationships and inspires Financial Advisors to achieve greater accomplishments. He educates, entertains and motivates audiences with an extraordinary flair and fast-paced combination of wit and intellect through compelling storytelling and anecdotes. He continues to draw standing ovations and top evaluations wherever he speaks.

### CONTACT US FOR DETAILS:

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