2020 | 2021 Consultative Selling and Negotiations

July 20 & July 22-23, 2020
Facilitated virtual learning

November 17-18, 2020
Scottsdale, AZ

March 9-10, 2021
New York, NY

*November and March programs are two-day programs.
Consultative Selling and Negotiations

**WSIA** joins with Richardson, a global sales training and performance company, to produce Consultative Selling and Negotiations via video teleconference on July 20 and July 22-23, 2020. This three-day program focuses on expectations in transactional relationships, styles of selling and negotiating, and offers insight into individual strategies and habits.

This program is not about hard sales tactics. It prepares you to develop relationships which puts the focus on your customer rather than you; strong relationships are based on continuous transactions rather than a single point in time.

**Training Geared toward Business Transaction**

**Learn the basics**
There is a difference between selling and negotiating, and there is an appropriate time to do both. Some foundational basics discussed are:
- Sales styles and approaches
- Framework for sales and negotiations
- Negotiation tactics

**Seriously prepare yourself**
Preparing yourself for the sale and negotiation process is key to a successful transaction. How you prepare affects your sales. Acquire tips to:
- Know your product
- Create your value proposition
- Develop measurable and short-term objectives

**Focus on your customer**
It’s important to stay focused on the customer rather than yourself or your company. Subject material covers:
- Customer’s objections and steps to resolutions
- Real-life examples and exercises

**WHO should attend**
All brokers, managing general agents and underwriters who transact business. This program is most beneficial to those E&S professionals who have relationships with clients. They will gain a greater understanding of clients’ needs and perspectives in a sales and negotiation process.

**WHAT to expect**
- With the current restrictions and changes due to COVID-19, Richardson has converted the originally two-day program into a facilitated virtual learning three-day experience.
- Richardson experts and sales trainers lead presentations and discussions on skills and strategies to change behavior and win in a selling environment.

**Communicate throughout process**
Dialogue is needed every step of selling and negotiating. How do you do this? This course provides an in-depth discussion of:
- Steps to open dialogue
- Nonverbal vs. verbal communication
- Solution dialogue
- Negotiation dialogue
- Selling and negotiating examples and exercises

**Evaluate yourself**
After this program you will be better positioned to self-reflect, self-assess and develop your own action plan designed to enhance your success.
“Rarely do I come out of a seminar or class feeling completely empowered and ready to use what I have learned, but this was not your everyday class. The class certainly paid off for me and gave me some great knowledge that I will use for the rest of my life.”

— MARK EISENMANN, AMWINS

“This program is focused, going in depth on the full sales experience, building relationships from the ground up, and the Richardson presenter is very dynamic and interesting… Really gives you the confidence and the knowledge to try a cold call.”

— WHITNEY POMEROY, CAPSPECIALTY

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**WHEN & WHERE**

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**REGISTRATION & COST**

- Registration for the July 2020 program opens May 2020 at www.wsia.org.
- Tuition is $1,045 per participant.
- The new July program schedule is posted and available on the Consultative Selling and Negotiations webpage at www.wsia.org.

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**WSIA TECHNICAL & CAREER DEVELOPMENT**

**Online Courses**

- **Surplus Lines Compliance**
  - For insurance professionals seeking an introduction to regulatory compliance
- **Surplus Lines Fundamentals**
  - For insurance professionals seeking an introduction to E&S
- **Underwriting Boot Camp**
  - For underwriters with single-line experience or employees in a technical role seeking to move into an underwriting role in the future
- **Marcus Payne Advanced E&S**
  - For E&S professionals with 5-15 years of insurance experience to strengthen their surplus lines knowledge
- **Surplus Lines Management**
  - For professionals transitioning into leading teams while still responsible for their own book of business
  - Offered at Emory University’s Goizueta School of Business in Atlanta, GA

**World-Class In-Person Programs**

- **Excess & Surplus Lines**
  - For professionals early in their careers to gain understanding of broker/carrier relationships and how surplus lines works in the marketplace
- **Consultative Selling and Negotiations**
  - For any surplus lines professional who transacts business and has relationships with clients
- **Effective Coaching**
  - For surplus lines professionals responsible for a team to receive customized coaching training
- **Executive Leadership Summit**
  - For E&S senior-level professionals developing and implementing strategic planning, leadership and management change
  - Offered at University of Virginia’s Darden School of Business in Washington, D.C. area

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**WSIA University**

- Designed to improve technical underwriting competency and develop networking relationships with peers

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**ALL LEVELS**

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