

NAVIGATOR

Closing the Sale

Most advisors get a little nervous going for the sales close; it's common. Choose a closing style that feels authentic and is effective. It will pay dividends.

Ideas

Here are a few different sales closing techniques tips to consider. They assume you have determined the prospective client is someone you'd like to work with.

1. Checklist Close

Brilliant if you had previously described each step to be completed before you landed the client.

"Here's the good news. We've completed the process we discussed when we first met. (Describe each of the steps to remind them). Are you ready to move forward?"

2. Level Set Close

Ideal for ensuring you and the prospective client are both seeing this relationship similarly.

"What would you envision success looks and feels like? (Are their expectations doable?) Great, we're both on the same page. Let's go over the client agreement now. Sound good?"

3. Direct Close

This is perfect for the types of prospects who appreciate directness. It's a rare close that an answer of "no" is a good thing.

"Is there anything that would preclude us from working together?"

Practice your chosen style. Soon you'll feel a behavior change. Closing sales become less stressful, more natural. Evaluate the effectiveness of this new approach. Are you closing new sales? How do you feel?

Eventually, a transformation will occur without realizing it. You'll be a prolific closer. OK, maybe that's a reach, but you'll improve this important skill.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the [Navigator website](#) often for new additions.