BILL WALTON
SALES TRAINING
a division of ProDirect, LLC.

25 YEARS • PRINCETON, NJ
Serving the top 100 insurance brokers and their carrier partners

ONE-DAY PROGRAM | ACCOUNT MANAGERS · CLIENT SERVICE · SUBJECT MATTER EXPERTS

Sales for Non-Salespeople™

Your service team already has the client's trust and the client's ear. This program gives them the timing, the language, and the confidence to turn that access into **rounded accounts, longer relationships, and revenue producers can't reach alone.**

Retention that holds

Every added line of coverage is one more reason a client stays — and one more obstacle for the competitor trying to unseat you.

Lifetime value realized

Clients rarely buy everything they need on day one. Account rounding closes the gap between what they bought and what they should own.

Teams that stop hesitating

Service professionals learn to raise a recommendation without feeling like they've stepped out of their role.

The business challenge

Brokerages are pressed to deliver dependable renewal revenue *and* aggressive growth, and producers alone cannot carry that number. The largest pool of untapped opportunity is already inside the building — the account managers, service professionals, and subject matter experts who talk to clients most often and are trusted precisely because they are not selling. They see the openings. What they lack is a repeatable, comfortable way to act on them.

The focus

Sales for Non-Salespeople™ is built for people whose first job is service and whose first instinct is not to sell. In one day, participants learn a light, client-first process for recognizing an unmet need, timing the conversation, and framing a recommendation that lands as advice rather than a pitch. Live practice and a running case study anchor every skill in Monday's work.

THE SERVICE-TO-GROWTH CONVERSATION

01 Notice — Hear the service moment that quietly signals an unmet need or an uncovered risk.

02 Frame — Put the gap in the client's own language — their exposure, not your product.

03 Ask — Run a prime-and-ask discovery sequence that always points to a next step.

04 Advance — Round the account yourself or hand a warm, well-qualified opening to the producer.

What participants take away

- **Freedom from the sales myths** that make selling feel unnatural to a service professional.
- **A trigger list of service moments** — renewals, claims, changes — that reliably open a risk conversation.
- **Prime and ask discovery sequences** that surface true need and always earn a next step.
- **A subtle account rounding approach** centered on the client's business, not the policy.
- **The right words and timing** for suggesting incremental risk conversations.
- **A method for working through reluctance** and asking for the business.

WHO SHOULD ATTEND

- Account managers and account executives
- Client service and client management professionals
- Subject matter experts and technical specialists
- Carrier and partner teams who serve alongside them

DELIVERY

1 Day	2 × 3.5 hr
In person, on site	Virtual sessions

Both formats feature real-world practice, live coaching, and a case study built for learning application.

ABOUT THE FIRM

For 25 years **Bill Walton Sales Training** has served client management professionals and subject matter experts who are expected to deliver client value every day.

The firm blends sales training, conversation management tools, and live opportunity coaching to help insurance brokers produce results their clients and their leadership can both measure and feel.

Based in Princeton, NJ, serving the top 100 insurance brokers and the carriers that support them.

BRING THIS PROGRAM TO YOUR TEAM
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