



# MORE<sup>TM</sup>

BY **Q4i** INTELLIGENCE

## SALES TRAINING

A proven path to filling your pipeline,  
closing more deals, and building a  
more profitable book of business.

**Q4i** INTELLIGENCE

# CURRICULUM OUTLINE

A breakdown of the video training courses that will guide producers to build and maintain healthy habits that drive predictable sales and growth.



## Course 01: Introduction to a Healthy Growth Model

Rather than having their own growth model, most agencies operate as more of a franchised distributor for the insurance carriers. This course lays out a healthier model that puts the producer and agency in control of their own growth and success.



### Lesson 1 - Introduction video

A welcome from your coaches introducing you to your growth experience and highlighting the exciting learning that lies ahead.





## Course 01

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### Lesson 2 - Breaking Down the Growth Model

Explore the vulnerabilities of the typical agency's business model and lay out a stronger foundation for a healthier model.

#### Video 1: Business Model

Break down and analyze the dangerous elements of the typical agency business model and discuss a healthier approach for each.

#### Video 2: Want vs. Have to Buy

Learn how to shift the focus from what your buyers HAVE to buy and resent buying to what they really WANT to buy and value.

#### Video 3: Expand Your Value

Explore how salespeople must evolve to remain relevant and bring increasing value to the sales conversation.

#### Video 4: Challenger Sale

A breakdown of the five distinct sales profiles. Dive deeply into why you must become a Challenger throughout the sales process.

#### Video 5: The Power of Why

Analyze the critical elements of a complete and effective sales message and the importance of approaching them in the right order.



# Course 01

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## Lesson 3 - Selling Is a Transfer of Confidence

This lesson breaks down the sources of confidence found in the most effective salespeople.

Video 1: Client Impact + Story + Pipeline

Identify and break down the three most critical factors that lead to sales confidence.



**LINDSAY CLARKE-YOUNGWERTH**  
**MANAGING PARTNER, THE SHANDRO GROUP**

"I don't remember the last time I was so confident in the future of my business! I made this investment in myself so I could feel this way again. Thank you!"





## Course 02: The MORE System

This sales training course will introduce you to the MORE System, a consultative sales process that drives consistent sales results and ensures the buyers on the receiving end make the best buying decision possible.



### Lesson 1 - Solutions Introduced

This lesson explains how to extract the maximum value from your solutions for your and your clients' benefit.

#### Video 1: Introduction to Solutions

Learn how to use your (value-added / non-insurance) solutions to deliver a significantly greater impact for your clients.



### Lesson 2 - MORE Overview

This lesson will provide a general overview of the MORE System and look at the key elements that make it work.

#### Video 1: Setting the Stage

Discover two key elements that pull prospects into your sales process and keep them moving forward.

#### Video 2: A High-Level Overview of the MORE System

As the title implies, this video will provide a high-level look at the entire MORE System sales process.





## Course 02

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### Lesson 3 - Strategic Analysis

This lesson explains how to effectively execute the Strategic Analysis, the second phase of the MORE System that clearly identifies the buyer's needs.

Video 1: Revisiting the Standard + Meeting's Intent

Discuss how these key elements are applied during the Strategic Analysis.

Video 2: Do you agree?

Evaluate how your beliefs align with the MORE System philosophies through a series of questions.

Video 3: Strategic Analysis Walkthrough

Break down the details of the Strategic Analysis phase of the sales process.

Video 4: Role Playing of Strategic Analysis

Hear how the Strategic Analysis is delivered.

Video 5: Preparing and using the Strategic Analysis Document

Learn how to build your version of the Strategic Analysis.



### Lesson 4 – Strategic Alignment Plan

This lesson explains how to effectively execute the Alignment Plan, the third phase of the MORE System that details how you will bring improved results to the buyer.



## Course 02

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### Video 1: Revisiting the Standard + Meeting's Intent

Discuss how these key elements are applied during the Alignment Plan.

### Video 2: Strategic Alignment Plan Walkthrough

Break down the details of the Alignment Plan phase of the sales process.

### Video 3: Role Playing of Strategic Alignment Plan

Hear how the Alignment Plan is delivered.

### Video 4: Preparing and using the Strategic Alignment Plan Document

Learn how to build your version of the Alignment Plan.



## Lesson 5 - Executive Briefing

This lesson explains how to effectively execute the Executive Briefing, the first phase of the MORE System that explains a more logical approach for buyers to choose their benefits advisor.

### Video 1: 3-Year Working | Not Working

We share a powerful conversation to differentiate yourself and get the buyer to discuss their goals.

### Video 2: Revisiting the Standard + Meeting's Intent

Discuss how these key elements are applied during the Executive Briefing.

### Video 3: Executive Briefing Walkthrough

Break down the details of the Executive Briefing phase of the sales process.

### Video 4: Role Playing of Executive Briefing

Hear how the Executive Briefing is delivered.

### Video 5: Preparing and using the Executive Briefing Document

Learn how to build your version of the Executive Briefing.



## Course 02

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### Lesson 6 - Establishing Habits

This lesson dives into habits and tools that keep you focused and productive.

Video 1: Training to Traction | Next 90 Days

Start building a 90-day plan to turn your new ideas and tools into sustainable habits.



**DAVID GRANT | PARTNER, SGL PARTNERS**

“It has been a while since I have felt so much purpose in my job. I appreciate it, and I am ready to learn more and make my craft so much better.”







## Course 03: Making Solutions Work for You in the Sales Process

This course will detail how to structure and use solution documents as integral pieces to the MORE System.



### Lesson 1 - Document Workshop / Putting It to Work For You

This lesson will focus on tools and effective strategies to capture and document your solutions.

#### Video 1: Introduction to Solutions

Learn how to use your (value-added / non-insurance) solutions to deliver a significantly greater impact for your clients.

#### Video 2: Taking Solution Inventory

Get started on a systematic approach to identifying and tracking your collection of solutions.

#### Video 3: Building and using Solution Worksheets

We introduce a worksheet that ensures you understand, communicate, and implement your solutions more meaningfully.





## Course 04: Building a Book of Business for Long- term Growth

This course focuses on strategies to drive consistent, predictable, and increased levels of growth.



### Lesson 1 - Know Your Numbers

This lesson will focus on ways to quantify your performance, from prospecting to execution to maintaining a healthy book of business.

#### Video 1: Key Performance Indicators

Discover and dissect the most critical metrics of growing your business.

#### Video 2: Book of Business

We show you how to analyze the financial health of your book of business.

#### Video 3: Gold-Silver-Bronze Goal Setting

We'll walk you through a process to confidently set a sales goal that will most likely result in a higher target than you would set on your own.



### Lesson 2 - Establishing Healthy Habits

This lesson dives into habits and tools that keep you focused and productive.



## Course 04

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### Video 1: Weekly Planning | Blocking Time

We introduce an approach to ensure effective time management.

### Video 2: Keeping the Pipeline Flowing

Learn proven strategies that keep prospects progressing through the pipeline.



**TAYLOR LINDSEY | VICE PRESIDENT & ADVISOR,  
EMPLOYEE BENEFIT CONSULTANTS**

“New business growth has experienced 20% or more compounding growth (less in 2020) for the past five years with our involvement with Q4i. We have successfully more than doubled our business in that amount of time and have goals to do it again by 2025.”





## Course 05: How to Fill Your Pipeline with Quality Prospects

This course will share prospecting insights that will help ensure your pipeline is filled with the right number of the right opportunities.



### Lesson 1 - Filling Your Pipeline

This lesson focuses on the most important sales ability of all—building and maintaining a healthy pipeline.

#### Video 1: Tiering Exercise

Solve the mystery of how to fill your pipeline with the highest quality opportunities possible—referrals from existing clients.

#### Video 2: Centers of Influence

A step-by-step process of how to establish center-of-influence relationships that become the powerful growth partnerships they need to be.

#### Video 3: Cold Approaches

Despite what most salespeople want to believe, cold approaches to prospecting can still be effective, and we'll explain how.





# Let's get to work.

In a world where the sales landscape is constantly evolving, staying ahead means not just keeping pace but setting the pace. This comprehensive curriculum has been meticulously crafted for sales professionals like you, who are driven to excel and grow their business. We dive deep into the tactics that make a difference, equipping you with skills to outperform and outlast in today's competitive market. Welcome to the path of relentless improvement towards new heights of success.

