



DAVENPORT™  
**AGENT'S  
PACK**

Agent's Sales Track



## Agent's Sales Track



A four point programme that works specifically in today's financial climate to deliver strong, repeatable, sales.

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Our Sales Track is specifically designed to achieve four important objectives:

**1 To give your clients and contacts improved peace of mind regarding their savings and investments.**

A key component of the Davenport Sales Track is that you can now immediately help your clients and contacts with two important areas of their finances:

- 1 Their savings and pensions (including - importantly - their SIPPs).
- 2 Their overseas property investments.

In today's financial climate it is increasingly important that UK savers and investors get the best possible returns on their money. Davenport have invested in both the creation and procurement of high return financial products and a range of overseas property products that now give those UK savers and investors strong and viable alternatives to poor return products elsewhere.

In addition, your clients and contacts can now reduce the risks sometimes associated with investing in the overseas property market by getting independent and honest advice from a source that they can trust. They do this safe in the knowledge that careful and stringent analysis has already been carried out on every product that we offer, specifically in order to minimise client risk.

**2 To give you the chance to complete as many Davenport Customer Profiles as possible.**

As you already know from building strong relationships with your clients and contacts, the basis of a mutually satisfactory commercial relationship is **your** understanding of **their** needs.

Consequently, we have made it easy for you to complete a Davenport Customer Profile in order that you can achieve the following outcomes:

- 1 A continued, and even enhanced, strong relationship with your clients.
- 2 An understanding from your clients that you can genuinely assist them with their savings and investments.
- 3 A better and more meaningful understanding of your client's financial position.
- 4 The fast and accurate gathering of useful data.
- 5 A long term, and highly rewarding, commercial relationship that benefits you both.

The Customer Profile is a single sheet of focused questions and could take as little as a couple of minutes to complete. Its simplicity and non-threatening nature means that it can be introduced to a client in any context that suits you, from its inclusion in a meeting on other matters, through to its use as a structure around which a meeting is specifically based. Or it can be completed in a couple of minutes over a phone call. Essentially, whichever method suits you and your client best.

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At the heart of the Customer Profile is its ability to be completed quickly and efficiently, both of which are essential to you maximising your earnings potential. This maximisation is due in large part to the data in your client's Customer Profile and how it then helps us assist them to select savings and investments that best suit their investment criteria, and also wherever relevant, which overseas properties best suit their needs and budget.

A major factor that underpins the success of the Customer Profile is its ability to uncover who in your client database is amongst the hungry audience of 3,000,000 people in the UK currently actively looking at the overseas property market.

In many ways, a successfully completed Davenport Customer Profile should drive this part of your business for you both now and in the future.

### **3 To improve your earnings potential by explaining the high quality, transparency and honesty of Davenport products.**

For Davenport Agents, this is a vital part of the Sales Track. It's the key differentiator that will distinguish you and the products that you discuss, and will position you and those products as a trusted source of wealth development both now and into the future.

This is the part of the Sales Track where you give the client the chance to see the high quality of products now available to them, explain that they now have the opportunity to speak to property experts that will help them to genuinely and honestly maximise their investments, and tell them how they can even make use of our overseas property inspection tours if they so wish. We back all of this up with the highest possible quality marketing material in support of both the financial and property products. This material supports your sales with clear explanations of the opportunities in the form of excellent brochure ware and on-line information created either in our own marketing department or made available to us from our range of quality developers.

The final, and most conclusive, proof of Davenport's inherent honesty is our unique Product Rating. As far as we know there are no other providers in our sector that dare do this, and our Agents benefit enormously from the fact that their clients can see at a glance the Risk versus Reward rating given to every product that we offer.

### **4 To help you maximise your earnings potential.**

We work closely with you to ensure that as a Davenport Agent you get the very most out of each opportunity, and additionally achieve your own personal goals in the shortest possible time.

The UK savings market is wide open to Davenport's high return financial products and the overseas property market is expected to grow significantly over the next three years. The truth is that many of your clients will be investing - with or without your help. It makes sound financial sense that you benefit from this opportunity whilst helping your clients to benefit too.

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### What are your personal targets and objectives?

Establish your own personal targets by first of all answering the following questions:

- **How many clients or contacts do you have?**
- **Do you have professional contacts with Solicitors, Accountants, Estate Agents or Professional Associations?**
- **What is the minimum number of customer profiles you would like to complete by the end of eight weeks?**
- **How many sales would you like to achieve by the end of eight weeks?**
- **What is your targeted number of sales for the next 12 months?**
- **What date would suit you to start implementing the Sales Track?**

Now start moving towards achieving those targets by adopting the following steps:

**1** Make contact with your clients, contacts and friends, inform them that you are now able to introduce to them a range of high return investment opportunities, and that you can achieve this because you are now working with Davenport Wealth Management. If appropriate, explain that we are improving the manner in which these products are introduced to clients in the UK by being totally honest and transparent at all times. The proof of this being the Davenport Product Rating.

**2** Follow up with information about the specific opportunity you wish to present, either in person or by e-mail, this may be by way of an informal talk, or by way of presenting printed or electronic information. From these follow ups, qualify that they wish to investigate further and then establish if the investment will be via personal monies or a SIPP.

**3** Once a potential client is qualified, you then have a choice of actions. If you're comfortable with both the sales process and your knowledge of the investment opportunity, then you can continue through the entire sales process. The alternative action being at this stage to inform your client that you will pass on their contact details to an expert in their identified need. We will then follow up the qualified lead for you and take the client through the sales process.

Note: you may find that a good method to assist you in converting leads to sales is to ask your potential clients to attend one of our seminars, or we can arrange a particular seminar tailored specifically for your clients, numbers permitting. Your clients can then meet and talk to both Davenport, and the developer, in person about the particular product on offer.

**4** The client will be taken through a process that will seek to understand their investment potential and to confirm that the product, and what it has to offer, matches their individual circumstances. The process will also explain the level of investment required, the benefits of investing in the appropriate product and, in the case of property investments, the associated benefits of investing with top quality developers and resort managers. The process will also go through the various levels of yields that could be reached with this investment.

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**5** Once the client decides to purchase, in the instance of a property purchase, they will be invited to secure their property by completing the relevant reservation forms and paying any associated reservation fees. In many cases, the client may be invited to visit the chosen development for an inspection trip as this enables them to really appreciate the benefits of their investment.

**6** Assuming the client continues and completes the purchase, commissions will be paid either on receipt of deposit, in the case of "off plan" developments, or on completion of the purchase, in the case of completed properties. These commissions will then be paid in line with your Agent's Agreement.

In some cases your clients will be utilising their pensions by unlocking the power of their SIPP. In this instance, follow the extended process in section 7 below:

**7** Once a client has decided for themselves that this investment opportunity is one they wish to utilise their personal pension for via a SIPP, the client will be introduced to an Independent Financial Adviser to carry out the necessary suitability study to ensure that this course of action is suitable for the client's circumstances. Once this is complete, the SIPP provider will carry out a second level of due diligence to ensure the purchase and product complies with SIPP regulations. If either part of this process is found to be unsuitable the client will not be able to continue with the purchase via this method.

This gives the client the comfort of knowing that they will not be sold something that is not suitable for their personal circumstances or an investment that is not suitable for a SIPP.

(Please note: where inspection trips are offered for free or within reservation fees, they are not available for SIPP clients. However, if a client wishes to visit the resort location, the client is quite welcome to do so at their own expense.)

### Summary and contacts.

Our Agents are as important to us as our products, so we work hard to support you with your personal sales targets and your personal objectives.

If at any time you need any assistance of any sort with anything at all associated with being a Davenport Agent, please call us in the first instance and we'll put you through to the person best suited to deal with your enquiry.

Just call Rob Pelling, our Business Development Manager, on: **0845 180 0104**

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