Sales Enablement Process

Target Audience: High-Net-Worth Individuals (HNWIs) & Business Owners

Stage	Description / Focus	Key Metrics to Analyze
1. Prospecting & Lead Qualification	Identify and qualify high-value leads through referrals, networking, and digital outreach.	• Lead source performance • Lead-to-opportunity conversion rate • % of leads meeting ideal client profile
2. Discovery & Needs Analysis	Conduct deep discovery sessions to understand financial goals, risk tolerance, and business objectives.	• Client fit score • Discovery completion rate • Advisor response time to inquiries
3. Proposal & Value Presentation	Present tailored solutions (investment, retirement, estate, and business succession planning).	• Proposal acceptance rate • Win rate • Quota attainment • Average deal size
4. Closing & Onboarding	Finalize agreements, onboard new clients, and align service expectations.	• Sales cycle length • Ramp time for new advisors • Content usage effectiveness (presentation materials, calculators, etc.)
5. Relationship Management & Retention	Deliver ongoing service, monitor portfolio performance, and encourage referrals.	• Customer satisfaction (CSAT or NPS) • Retention rate • Referral volume • Client lifetime value (CLV)
6. Continuous Improvement & Feedback	Use analytics and training to strengthen advisor performance and sales enablement programs.	• Knowledge retention (training assessments) • Content adoption (usage rate) • Advisor performance grade (1–10)

Advisor Performance Dashboard (Summary Metrics)

Category	Metrics	Purpose
Sales Performance	Win rate, quota attainment, proposal-to-close ratio	Measure effectiveness in closing business
Sales Productivity	Sales cycle length, ramp time, time-to-first-sale	Identify process efficiency and training needs
Content Usage	Presentation materials used, digital tool adoption	Evaluate sales enablement resource value
Rep-Level Performance	Knowledge retention, certification completion, content adoption	Track learning and continuous improvement
Customer Metrics	CSAT/NPS, retention, referral rate	Measure relationship strength and satisfaction
Advisor Grade (1–10)	Overall composite of performance, satisfaction, and compliance	Benchmark advisor excellence