



2024

Knowledge Share - Sales  
NEFA  
ABLE LEADERSHIP



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# Today's market

In the equipment finance industry, sales professionals need to possess a unique blend of skills to navigate the complexities of financial products and services effectively.

- 1. Industry Knowledge and Expertise:** Understanding the nuances of the equipment leasing and commercial finance sector is crucial.
- 2. Data Analytics:** With the finance function dealing significantly with numbers and various forms of data, finance managers and analysts in the equipment finance industry should be capable of analyzing this data to draw accurate and insightful conclusions. This skill is essential not just for internal financial management but also for advising clients on the best financial strategies and solutions for their equipment needs.
- 3. Digital Proficiency and Adaptability:** The rapid digital transformation within the finance sector means sales professionals must be proficient in using technology, reporting tools, RPA bots, artificial intelligence apps, and other digital technologies.

This digital savviness enables them to streamline processes, enhance customer experiences, and stay ahead in a competitive market.



# Best practices: Tactical

## Dealer or Venders:

Learn AI (buyer persona, emails, video, bomb bomb).

Sign up for dealer newsletters.

Sign up for end user newsletters.

Google alerts for OEM's, competitors, dealers, current company.

Follow on Social Media and engage!



# Referrals – Biggest Opportunity



**83% of people have a business they love so much they would be happy to refer (but only 29% actually do).**



First, you have to be referable (people find value and love what you do). You then need to something to amplify your referability.



Why do we give and receive referrals?

Need it to survive. We crave the social currency. Referrals remove risk.



Why it matters to your business?

Easily attract ideal customers, shortens the sales cycle, provides you with the ability to charge premium pricing, and magnifies the lifetime value of your service.



# How to develop

Customer has too: **Know – Like – Trust**

To expect referrals, talk about referrals, and learn.

Don't make it feel like you're begging.

Referrals fit into the customer journey (***not the marketing funnel - that's too generic and impersonal***).

Think about starting with the end in mind. What would it take to get 100% off your customers referring you - and then build the process and everything you do under the banner of marketing will look different!

# How

## Referral Offers for Clients

- Asking every single one of your customers for referrals (but they need to be happy).
- Direct offers, implied offers, and tangible offers
- Both parties need to win, creatively tie to the brand, and be consistent with the process.

Pre-written email they can use (make it easy) for the client. (example next page)

referrals

# Email example

Subject: Help Us Grow with Your Referrals

Dear [Customer's Name],

I hope this message finds you well and thriving. We're reaching out to express our heartfelt thanks for choosing [Your Company's Name] for your [type of service/product]. Your support has been pivotal to our growth and success.

As we aspire to assist more wonderful clients like yourself, we kindly invite you to share our services with other businesses who might benefit from them.

Your referral is the highest compliment we could receive and is vital to our continued growth.

As a token of our appreciation, for every new client that signs up through your referral, we'll [mention any referral incentive, if applicable, like a discount, gift, or special offer].

Referring is easy - simply [provide referral instructions, like forwarding an email, sharing a link, or contacting a specific person].

Thank you once again for your trust and support. We're looking forward to serving more great customers like you, thanks to your help.

Warmest regards,

Feel free to adjust the content to better fit your company's tone and the specifics of your referral program!

# Email for your customer to send

Subject: A Finance Recommendation for You

Dear [Recipient's Name],

I'm reaching out to share something that I believe could be of significant value to you and your business.

Recently, I had the pleasure of using the services of [Your Company's Name], and I've been thoroughly impressed by the quality of their work and the professionalism of their team.

They offer equipment financing that have made a noticeable difference in the process we seek financing.

If this piques your interest, I highly recommend reaching out to them for a consultation or to simply explore their offerings. You can contact [Contact Person's Name, if applicable] at [Contact Information] or visit their website at [Website URL] for more information.

I wouldn't recommend something I don't believe in, and I genuinely think they could offer you the same great experience and benefits they've provided to me.

Best regards,

[Your Name]

[Your Position, if applicable]

[Your Company, if applicable]

[Your Contact Information, if you wish to offer]

This template is designed to be adaptable, so feel free to modify it to better suit your preferences or the specificities of your relationship with the recipients.



If you're not satisfied with your marketing, and sales it's time to try a new strategy. ABLE LEADERSHIP has spent the last 10 years developing a strategic approach to marketing and sales that has been installed in 1000s of businesses and generated over \$120M in new originations.

Partner With ABLE LEADERSHIP To Unlock the Secrets of Predictable Revenue and Profit Growth.

