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OCTOBER 14–17, 2014 • THE SHERATON DOWNTOWN DENVER, COLORADO

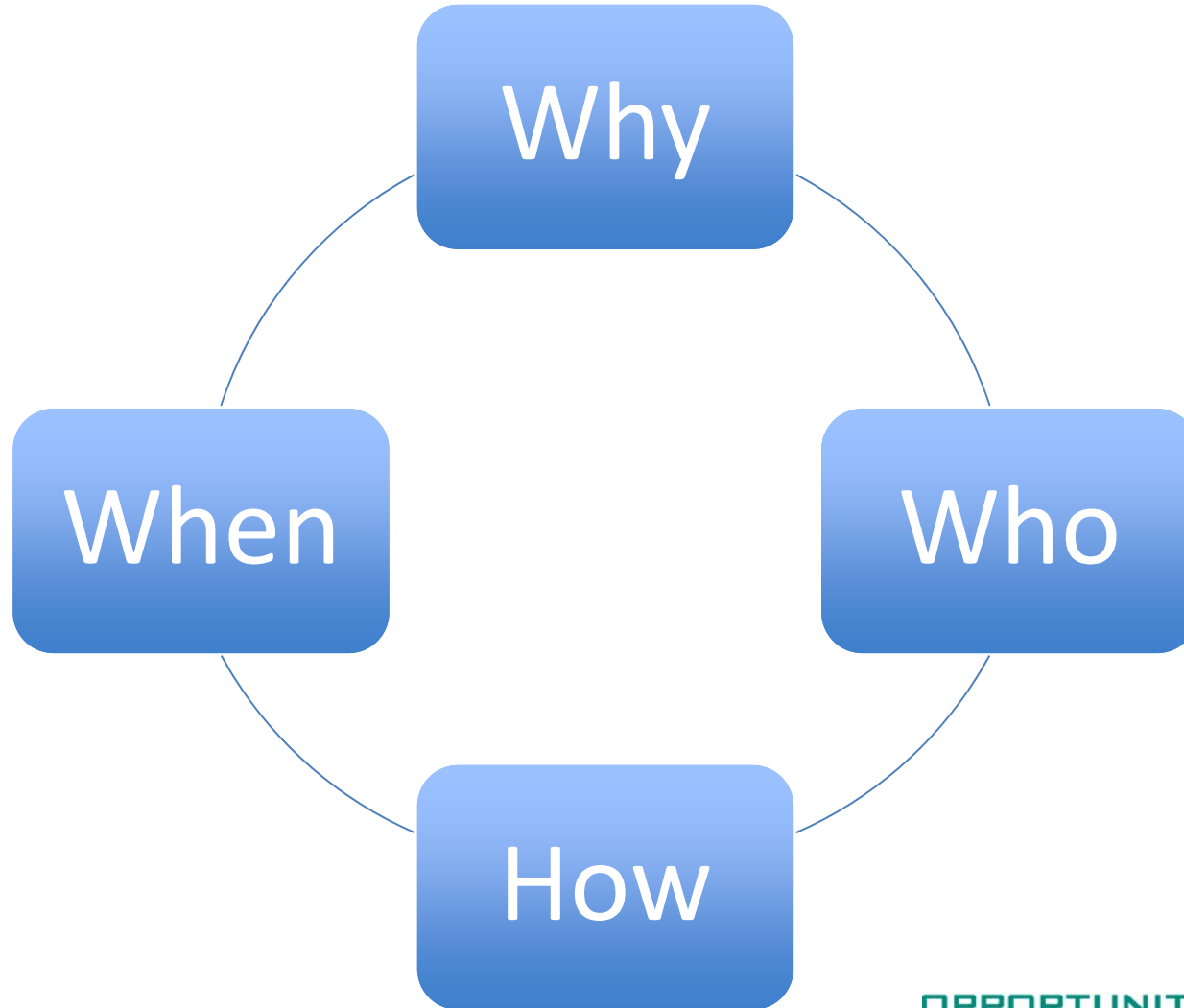
Sales with a Mission Twist

Tips on Reaching Program Goals

Agenda

- Welcome/Introductions
- Overview of Speed Dating Sessions
- Closing: one big takeaway from each small group
- Thank You / How to contact us

Meaning and Mission of Sales



Rules of the Speed-Dating Road

- Pick three speed-dating groups.
- Each group gets 20 minutes.
- The group leader will facilitate a discussion around a guiding question.
- Work together to create space for dialogue.
- Have fun!

Galen Gondolfi



- **Job:** Chief Communications Officer at Justine Petersen
- **Focus:** Small business and consumer micro lending; community and media relations
- **Passion:** Animals!, Animals!, Animals! (and micro lending)
- **First Gig:** Paper route at age 8
- **Fun Fact:** Shares household with one wife, two cats and four dogs

Building Relationships for Repeat Mission Sales:

Galen Gondolfi

- *How do you build relationships that generate repeat mission-driven sales?*
 - Marrying mission with sales: comfort zone
 - Justine Petersen's commitment to customer
 - Relationships that yield word of mouth referrals
 - Post closing TA drives future sales
 - Improving the equation: relationships = sales = mission fulfillment

Roberto Valdez-Beltran



- **Job:** Market Manager, Accion Arizona
- **Focus:** Small business lending
- **Passion:** Relationship building
- **First Gig:** Co-editor for business section of Grupo Reforma
- **Fun Fact:** Helped my mom run a small convenience store in Mexico

Key Qualities of Mission Rainmakers: Roberto Valdez-Beltran

- What are the key qualities of mission-focused rainmakers?
 - Core values alignment, volunteerism, results oriented
 - Rainmakers do like to be supported to take control
 - Aspire to work with purpose and have a tangible impact

Barbara Eckblad



- **Job:** Associate, Freidman Associates
- **Focus:** Micro and small business lending
- **Passion:** Travel
- **First Gig:** Launched and owned commercial & residential real estate firm
- **Fun Fact:** In 2012 climbed Mt. Kilimanjaro

Engaging Your Operations Team to Support Lending Goals:

Barbara Eckblad

- *How can your operations folks support mission-driven sales?*
 - Tips on how operations folks can increase sales
 - Create a culture of up-selling
 - Incentivize second sales

Vicky Stein



- **Job:** Director of Strategic Partnerships at CRF USA
- **Focus:** Small business lending; policy/advocacy
- **Passion:** Building successful partnerships
- **First Gig:** Wall Street
- **Fun Fact:** Love Bag Pipe music!

Building a Disciplined Culture of Follow Up: Vicky Stein

- *How does effective follow up enhance mission driven sales?*
 - Driving sales through effective relationship building
 - Why is follow up important for mission driven organizations?
 - Implementing effective follow up processes

Leslie Hoffman



- **Job:** Principal, LEH Consulting Group/Consultant, FIELD
- **Focus:** Micro and small business lending
- **Passion:** High-quality sales
- **First Gig:** Journalist
- **Fun Fact:** First career aspiration – Indy car driver

Lenders and the Closing Process

Leslie Hoffman

- *How can you get your lenders to get the most out of your loan closing process?*
 - How to position loan closing as a celebration
 - Transform the process into an incentive for lenders
 - A loan well closed is a loan half collected

Takeaways?



Energy flows where attention goes.



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