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

- Why
- When
- Who
- How
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, Friedman 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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