



# FOX SALES CHALLENGE

## Round 1:

You are a Regional Sales Consultant for Prudential Annuities, a business of Prudential Financial. In this role, you educate financial advisors on Prudential Annuities investment solutions so that they can then recommend those strategies to their clients. You have held this position for two years. You have recently acquired the city of Philadelphia into your territory. In order to move up quickly into a more senior sales role you are trying to exceed your sales goal to impress your superiors.

You attended an alumni event at your alma mater Temple University. Here you ran into an old friend from your sales club, his name is Sean Gold. Sean mentions he currently works as a Financial Advisor for Ameriprise Financial Services. He mentions that he is always willing to learn about new and exciting strategies in the marketplace. You mention that Prudential Annuities has recently launched a new solution, the Flexguard Index Variable Annuity. After discussing the basics of the strategy with Sean, you uncover that some of Sean's clients may benefit from a strategy like the Flexguard IVA.

Sean has scheduled a 15 minute meeting for you with his Sr. Associate Jeff Schmidt. During this 15 minute discussion with Jeff, it is your job to uncover what Ameriprise is looking for in a new product, solicit interest in Flexguard, and get an introduction to Cory LaFleur, Corner Office Advisor.

### Goals:

- Solicit interest in Flexguard
- Set a meeting with Cory Lafleur, Corner Office Advisor

## Round 2:

Your conversation with Jeff went well and as promised, Jeff provided a warm introduction to Cory LaFleur via email. Through this email chain, you've scheduled a 15 minutes discussion with Cory to further explore how Flexguard could potentially fit in his business.

### Goals:

- Recap the takeaways from your previous conversation with Jeff
- Continue to solicit interest in Flexguard
- Identify a specific client who can benefit from Flexguard
  - Age, \$\$ looking to invest, and specific strategy they'd like to use

(this enables you to run an illustration showing how this strategy could potentially work for this client's specific situation)

**Product Info:**

- **Prudential:**

- <https://www.prudential.com/welcome-back>

- **FlexGuard:**

- <https://tinyurl.com/FlexGuard>

- **Videos:**

- [https://www.youtube.com/watch?v=5snk760cZ90&ab\\_channel=Prudential](https://www.youtube.com/watch?v=5snk760cZ90&ab_channel=Prudential)
- [https://www.youtube.com/watch?v=07jUahJd6IE&ab\\_channel=Prudential](https://www.youtube.com/watch?v=07jUahJd6IE&ab_channel=Prudential)
- <https://www.youtube.com/channel/UC3u8dFzKIGP9Fw8AAAdy-hLg>