

Module 7: Presenting Solutions

Role-Specific Application Guide & Video Resources

Supplemental Training Material



Video Resources for Module 7

Core Presentation Training

“5 Steps to the Perfect Solution Presentation | Sales Strategies”

<https://www.youtube.com/watch?v=VUmw516AtJg>

Duration: ~15 minutes

A simple five-step process for presenting solutions that you can apply to every business, product, solution, and service.

“Presenting Solutions [Sales Process Part 6 of 9]”

<https://www.youtube.com/watch?v=xf-mhhbL2tk>

Duration: ~12 minutes

The part of the sales process that people think of as ‘selling’ —the step where you present solutions to meet your prospect’s needs.

“Jordan Belfort on Presenting Elegant Sales Solutions”

<https://www.youtube.com/watch?v=3dGSf7Tb9vo>

Duration: ~20 minutes

Jordan Belfort’s approach to presenting elegant sales solutions that close deals.

“The Solution Selling Sales Exercise”

<https://www.youtube.com/watch?v=pvcogig3-xk>

Duration: ~18 minutes

Sales coach Shelley Lavery’s favorite sales training exercise that turns ‘product pushers’ into solution sellers.

Presentation Skills & Delivery

“How to Enhance Your Sales Presentation Skills”

<https://www.youtube.com/watch?v=fnYDEkL4SnA>

Duration: ~15 minutes

Tips for delivering engaging and persuasive sales presentations that capture and hold your audience’s attention.

“How to Present UNFORGETTABLE Sales Presentations - Tips”

<https://www.youtube.com/watch?v=NPRCQ1RgbsY>

Duration: ~12 minutes

Making use of storytelling techniques, metaphors, analogies, and personality to create memorable presentations.

“How I Give A Sales Presentation in My \$300k+ Tech Sales Job”

<https://www.youtube.com/watch?v=jOkEuBUifWA>

Duration: ~20 minutes

Real-world breakdown of how to give an effective sales presentation from a high-performing tech sales professional.

“Top Virtual Sales Presentation Tips: Engage & Close More”

<https://www.youtube.com/watch?v=-ocFDeh8Ugo>

Duration: ~15 minutes

Master virtual sales presentations and keep your clients engaged in the digital environment.

Role-Specific Applications

For Ronald (Head of Client Relationships) - PRIMARY FOCUS

Your Role in Module 7:

Ronald, the presentation stage is where you **shine**. This is your opportunity to demonstrate your expertise, build deeper trust, and show clients exactly how you’ll solve their problems. Your presentations should be consultative, thorough, and relationship-focused.

Key Focus Areas:

1. The Consultative Presentation Approach

Your presentations are not product pitches—they’re strategic consultations.

Your Presentation Philosophy: You’re not selling loans; you’re solving problems and enabling success. Your role is trusted advisor, not salesperson. Every presentation should feel like you’re on their team, helping them make the best decision for their business.

Preparation is Everything: Before every presentation, spend 30-60 minutes preparing. Review your discovery notes in detail. Research the property (if applicable). Prepare customized materials. Anticipate questions and objections. Practice your presentation out loud. The more prepared you are, the more confident and effective you’ll be.

2. The 7-Step Presentation Framework (Ronald’s Version)

Step 1: Recap Discovery (10 minutes)

Begin by demonstrating you listened and understood. Summarize their investment strategy, current challenges, timeline, and goals. Use their exact words when possible. Ask for confirmation: “Did I capture everything accurately? Is there anything I missed?” This builds trust and ensures alignment.

Step 2: Present Recommended Solution (20-25 minutes)

Present your recommended loan product and structure. Explain your reasoning: “Based on what you shared about [specific need], I’m recommending [specific solution] because...” Walk through the loan structure, terms, and features. Always tie features back to their needs: “You mentioned [pain point], and this feature addresses that by...”

Step 3: Paint the Picture of Success (10 minutes)

Help them visualize their success using your solution. “Here’s what this looks like in practice...” Walk them through the process from application to closing to their successful investment outcome. Make it tangible and real. Use specific numbers and timelines.

Step 4: Provide Social Proof (10 minutes)

Share 1-2 highly relevant case studies. Choose examples that closely match their situation. Tell the story: “I recently worked with an investor very similar to you. They were facing [similar challenge]. We structured a [similar solution]. The result was [specific outcome].” If you have a testimonial from that client, share it.

Step 5: Present Options (If Applicable) (10 minutes)

If multiple loan products could work, present 2-3 options. Frame them as “good, better, best” or based on different priorities. For each option, explain: What it is, pros and cons, who it’s best for. Then make your recommendation: “Based on your priorities, I recommend Option 2 because...”

Step 6: Confirm Understanding and Address Concerns (10 minutes)

Ask open-ended questions: “What questions do you have?” “How does this solution feel to you?” “What concerns do you have?” Create space for them to voice hesitations. Address concerns thoroughly and honestly. Don’t rush this step—it’s where trust is solidified.

Step 7: Discuss Next Steps (5 minutes)

Clearly outline the path forward. “Here’s what happens next...” Explain the application process, timeline, what you need from them, and what they can expect from you. Set specific next actions: “Can we schedule 30 minutes tomorrow for me to help you complete the application?” Get commitment before ending the call.

3. Customization Mastery

Every presentation should feel like it was created specifically for that client.

Personalization Checklist:

- Use their name frequently throughout
- Reference specific properties or deals they mentioned
- Use their language and terminology
- Choose case studies that match their situation
- Adapt to their DISC personality
- Address their specific pain points
- Match their communication preferences

DISC Adaptation in Presentations:

D (Dominant) Clients:

Keep it concise and focused on results. Lead with the bottom line. Present options and let them choose. Be confident and direct. Don’t waste time on unnecessary details. Focus on ROI and competitive advantage.

I (Influential) Clients:

Be enthusiastic and engaging. Use storytelling extensively. Build personal connection. Share success stories with emotion. Make it exciting and fun. Focus on relationships and possibilities.

S (Steady) Clients:

Be patient and supportive. Don't rush the process. Provide reassurance throughout. Show how you'll support them. Use testimonials from similar clients. Focus on stability and security.

C (Conscientious) Clients:

Provide detailed information and data. Be precise and accurate. Back up claims with documentation. Give them time to analyze. Answer all questions thoroughly. Focus on facts and logic.

4. Handling Pricing Discussions

Pricing is where many deals are won or lost. Handle it strategically.

Value First, Price Second:

Never lead with pricing. Build value throughout your presentation. When you get to pricing, they should already understand the value. Frame pricing as an investment in their success, not a cost.

Transparent Pricing Presentation:

Break down all costs clearly: interest rate, points, origination fees, third-party fees. Explain what each component is and why it exists. Show the total cost of the loan. Provide a written breakdown they can reference.

Handling "That's Expensive" :

"I understand. Let me put this in perspective..." Compare to the opportunity cost of not acting (lost deal, slower closing, etc.). Show the ROI they'll achieve. Emphasize the value they're receiving (speed, service, expertise, reliability). If appropriate, show how your pricing compares to alternatives when you factor in all costs.

Positioning Premium Pricing:

If your pricing is higher, own it. "We're not the cheapest option, and here's why..." Explain what they get for the premium: fastest closings, best service, most reliable funding, expert guidance. Use social proof: "Our clients choose us because they value [speed/reliability/expertise] over saving a few hundred dollars." Position yourself as the premium choice for serious investors.

5. Virtual Presentation Excellence

Most of your presentations will be virtual. Master this medium.

Technical Setup:

Test everything before the call. Use a professional background. Ensure good lighting and audio. Have backup plans for tech issues. Send materials in advance.

Engagement Techniques:

Share your screen with clean, organized materials. Use visual aids extensively. Check in frequently: “Can you see this clearly?” Maintain eye contact with camera. Vary your pace and tone. Ask questions throughout.

Virtual-Specific Tips:

Record the presentation (with permission) so they can review later. Use annotation tools to highlight key points. Share your screen to show rate sheets, comparisons, or case studies. Send a follow-up email with all materials and recording link.

6. Post-Presentation Follow-Up

The presentation doesn’t end when the call ends.

Same-Day Follow-Up:

Send a summary email within 2 hours. Recap what you presented. Include all materials (rate sheets, case studies, etc.). Restate next steps. Thank them for their time. Express enthusiasm about working together.

If They Need Time to Decide:

Don’t leave it open-ended. Set a specific follow-up time: “I’ll call you Thursday at 2pm to answer any questions and discuss next steps. Does that work?” Put it on both calendars. Follow through exactly when you said you would.

Addressing Unanswered Questions:

If you couldn’t fully answer a question during the presentation, research and respond within 24 hours. “You asked about [topic] during our call. I’ve looked into it and here’s the detailed answer...” This demonstrates reliability and thoroughness.

Ronald’s Implementation Checklist:

- Create presentation template using 7-step framework
- Develop 5-10 case studies for different client types
- Build visual aids library (rate sheets, comparisons, process diagrams)

- Practice presentations out loud (record yourself)
- Develop DISC adaptation strategies for presentations
- Create pricing presentation framework
- Master virtual presentation technology
- Build post-presentation follow-up templates
- Track presentation metrics (presentation → application rate)
- Get feedback from clients on presentation quality
- Refine based on what leads to closes

Ronald's Video Resources:

- Watch “5 Steps to the Perfect Solution Presentation” as your foundational framework
- Study “Jordan Belfort on Presenting Elegant Sales Solutions” for advanced techniques
- Review “How to Present UNFORGETTABLE Sales Presentations” for storytelling
- Master “Top Virtual Sales Presentation Tips” for online presentations

Ronald's Success Metric:

80%+ of presentations result in scheduled next steps. 60%+ of presentations result in submitted applications within 7 days. Client feedback: “Best presentation I’ve seen from a lender.”

For Shawn (Head of Lead Response) - SUPPORTING ROLE

Your Role in Module 7:

Shawn, you typically don’t do full presentations—that’s Ronald’s role. However, you do need to present the “next step” effectively when handing off to Ronald.

Key Focus Areas:

1. The Handoff Presentation

Your “presentation” is explaining why they should take the next step with Ronald.

Your Script:

“Based on what you’ve shared, this sounds like a great fit for our lending programs.

The next step is a deeper conversation with Ronald, our Head of Client Relationships. He'll do a thorough analysis of your investment strategy and structure the best loan solution for you. He's helped hundreds of investors like you, and he's excellent at what he does. Let me get him on your calendar right now."

2. Setting Expectations

Explain what the call with Ronald will cover.

What to Say:

"Ronald will spend about 45 minutes with you. He'll ask more detailed questions about your investment strategy, walk through loan options that fit your needs, and show you exactly how we can help. He'll also share examples of similar deals we've funded. By the end of the call, you'll have a clear picture of your financing options and next steps."

3. Building Ronald's Credibility

Your job is to make Ronald sound like the expert he is.

Credibility Statements:

- "Ronald has helped over 200 investors structure their financing"
- "He specializes in working with [their type of investor]"
- "Clients love working with him—he really takes the time to understand their business"
- "He's the best at what he does"

Shawn's Implementation Checklist:

- Memorize handoff presentation script
- Practice explaining what Ronald's call will cover
- Develop credibility statements about Ronald
- Perfect the calendar booking process
- Track handoff acceptance rate
- Get feedback from Ronald on handoff quality

Shawn's Success Metric:

90%+ of qualified leads accept handoff to Ronald. Ronald rates handoff quality 4.5/5+.

For Tamara (Head of Operations) - SUPPORTING ROLE

Your Role in Module 7:

Tamara, your job is to create the systems and materials that enable effective presentations.

Key Focus Areas:

1. Presentation Materials Library

Build and maintain all presentation materials.

Materials to Create/Maintain:

- Rate sheets for each loan product (updated weekly)
- Loan comparison charts
- Process timeline diagrams
- Case study documents (5-10 examples)
- Client testimonials (written and video)
- Cost breakdown templates
- ROI calculators
- Presentation slide decks (if used)

2. CRM Presentation Tracking

Build systems to track presentation effectiveness.

CRM Fields to Create:

- Presentation date and time
- Presentation duration
- Loan product(s) presented
- Materials shared
- Next step agreed upon
- Presentation recording link
- Follow-up scheduled date
- Outcome (application submitted, declined, needs more time)

Analytics to Track:

- Presentation → application rate
- Presentation → close rate
- Average time from presentation to decision
- Most effective case studies/materials
- Presentation length correlation with success

3. Presentation Quality Assurance

Review presentations for quality and consistency.

Weekly Review Process:

- Listen to 2-3 of Ronald's presentations
- Score against quality criteria
- Identify best practices to share
- Identify areas for improvement
- Update materials based on feedback

Quality Criteria:

- Used 7-step framework
- Customized to client
- Connected solutions to needs
- Provided social proof
- Handled pricing effectively
- Ended with clear next step

4. Presentation Workflow Automation

Automate presentation follow-up and tracking.

Automated Workflows:

- Presentation scheduled → Send pre-call materials
- Presentation completed → Create follow-up task
- Presentation completed → Send summary email template

- No next step scheduled → Escalation alert
- Application not submitted in 7 days → Follow-up reminder

Tamara's Implementation Checklist:

- Build presentation materials library
- Create rate sheet update process
- Develop 10 case study documents
- Build CRM presentation tracking fields
- Create presentation analytics dashboard
- Implement quality review process
- Set up presentation workflow automation
- Train Ronald on materials and systems
- Track which materials correlate with closes
- Continuously update based on effectiveness

Tamara's Success Metric:

100% of presentations have updated materials. Presentation materials rated 4.5+ by Ronald. Presentation → application rate improves 20%+ due to system improvements.

For CEO (Strategic Oversight) - LEADERSHIP ROLE

Your Role in Module 7:

As CEO, you coach presentation excellence, conduct strategic presentations personally, and ensure the team has the tools they need.

Key Focus Areas:

1. Presentation Coaching

Develop Ronald's presentation skills through active coaching.

Weekly Coaching Sessions:

- Listen to 2-3 of Ronald's presentations
- Provide specific, actionable feedback
- Role play challenging scenarios

- Share advanced techniques
- Celebrate excellent presentations

Coaching Focus Areas:

- Customization and personalization
- Storytelling and engagement
- Handling pricing discussions
- Addressing objections during presentation
- Closing with confidence

2. Strategic Account Presentations

For high-value opportunities, you lead or co-lead presentations.

CEO Presentation Criteria:

- Deal size over \$X threshold
- Strategic partnership opportunity
- High-volume investor (10+ deals/year)
- Referral from key relationship
- Complex deal requiring executive involvement

Your Presentation Approach:

- Focus on strategic partnership, not just transaction
- Discuss long-term relationship and growth
- Share company vision and values
- Build executive-level relationship
- Emphasize commitment to their success

3. Presentation Process Optimization

Continuously improve presentation effectiveness.

Monthly Presentation Review:

- Analyze presentation → close conversion rates
- Identify patterns in successful presentations

- Update presentation framework based on insights
- Improve materials and case studies
- Refine pricing presentation approach

Questions to Ask:

- Which presentations led to closes? What did they have in common?
- Where are we losing deals after presentations?
- What objections come up repeatedly?
- How can we improve our materials?
- What training does Ronald need?

4. Competitive Differentiation

Ensure presentations clearly differentiate from competitors.

Differentiation Strategy:

- What makes our presentations different?
- What unique value do we offer?
- How do we demonstrate expertise?
- What proof do we provide?
- Why should they choose us?

CEO Implementation Checklist:

- Schedule weekly presentation coaching with Ronald
- Create presentation coaching rubric
- Define criteria for CEO involvement
- Conduct presentations for top 10% of opportunities
- Lead monthly presentation process review
- Analyze presentation metrics and trends
- Ensure team has best-in-class materials
- Develop competitive differentiation strategy
- Track team presentation skill improvement

- Tie presentation quality to recognition/compensation

CEO Success Metric:

Team presentation → close rate improves 30%+ year-over-year. CEO-led presentations close at 80%+ rate. Company recognized for “best presentations in the industry.”



Presentation Metrics by Role

Ronald’ s Key Metrics:

Metric	Target	Measurement
Presentations Completed	10-15/week	Consistent volume
Presentation → Next Step Rate	80%+	Clear advancement
Presentation → Application Rate	60%+	Within 7 days
Presentation → Close Rate	40%+	Ultimate success
Client Satisfaction with Presentation	4.8/5+	Post-presentation survey

Shawn’ s Key Metrics:

Metric	Target	Measurement
Handoff Acceptance Rate	90%+	% who agree to Ronald call
Handoff Quality Rating	4.5/5+	Ronald’ s assessment

Tamara’ s Key Metrics:

Metric	Target	Measurement
Materials Up-to-Date	100%	Weekly review
Presentation Documentation	100%	All logged in CRM
Quality Reviews Completed	4-6/week	Consistent QA

CEO's Key Metrics:

Metric	Target	Measurement
Coaching Sessions	1/week with Ronald	Consistent development
Strategic Presentations	2-4/month	High-value accounts
Team Presentation Conversion	30%+ improvement YoY	Process optimization

Additional Video Resources by Topic

For Storytelling in Presentations:

- Search YouTube: “storytelling in sales presentations”
- Search YouTube: “sales presentation storytelling techniques”
- Search YouTube: “narrative selling”

For Visual Aids:

- Search YouTube: “sales presentation design”
- Search YouTube: “effective sales slides”
- Search YouTube: “visual selling techniques”

For Handling Questions:

- Search YouTube: “handling questions during presentations”
- Search YouTube: “sales presentation Q&A”
- Search YouTube: “objection handling during presentation”

For Virtual Presentations:

- Search YouTube: “virtual sales presentation best practices”
- Search YouTube: “zoom sales presentation tips”
- Search YouTube: “remote selling techniques”



Presentation Success Formula

Preparation × Customization × Delivery × Follow-Up = Presentation Success

Preparation: Review discovery notes, prepare materials, practice presentation

Customization: Adapt to client's needs, personality, and situation

Delivery: Use framework, engage client, tell stories, handle objections

Follow-Up: Send materials, schedule next step, stay in touch

🎯 Key Takeaways by Role

Ronald: Presentations are your competitive advantage. Master the consultative approach, customize every presentation, and always connect solutions to needs. Your presentation quality directly impacts your close rate.

Shawn: Your handoff presentation sets up Ronald for success. Build his credibility, set clear expectations, and make it easy for prospects to say yes to the next step.

Tamara: Your systems and materials enable great presentations. Keep materials updated, track effectiveness, and continuously improve based on data.

CEO: Your coaching elevates presentation excellence. Provide feedback, share best practices, and personally present for strategic accounts. Presentation quality is a competitive differentiator.



Next Steps

Ronald:

1. Review and practice the 7-step presentation framework
2. Create/update your case study library
3. Record your next 5 presentations for self-review
4. Get feedback from CEO on presentation quality

5. Track your presentation metrics weekly

Shawn:

1. Perfect your handoff presentation script
2. Practice building Ronald's credibility
3. Track handoff acceptance rate
4. Get feedback from Ronald on handoff quality

Tamara:

1. Audit current presentation materials
2. Create missing materials (case studies, rate sheets, etc.)
3. Build presentation tracking in CRM
4. Implement quality review process
5. Set up presentation analytics dashboard

CEO:

1. Schedule weekly presentation coaching with Ronald
2. Listen to 3 presentations this week
3. Provide specific feedback
4. Define criteria for your involvement
5. Review presentation metrics and identify improvements

This supplemental guide should be used alongside the Module 7 Training Guide and Worksheet. Effective presentations are where discovery insights turn into closed deals —master this stage and you'll dramatically increase your success rate.