

Wholesaler Roadmap to the Top

Why Most Wholesalers Struggle to Get to the Next Level, and How a Simple Roadmap Can Change Everything!

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Ever feel like your days start out with good intentions, but you quickly find yourself reacting to emails, phone calls, or random ideas that pop into your head?

You start, stop, and change directions, bouncing around like a ping pong ball. But by the end of the day, you really didn't accomplish much.

Despite how hard you work, the results you're after don't feel any closer. You start questioning if you're even doing the right things! If that sounds familiar, you're not alone. For many wholesalers, the whirlwind of daily tasks can keep them from producing at the level they're capable of.

The issue most wholesalers have isn't that they don't work hard enough. It's that they're not seeing enough results from their effort.

The good news is, it's not your fault and if you stay with me until the end I'll tell you exactly why, and how you can fix it.

If you're like most wholesalers, you've either experienced or have been told that it's all about activity and how many times you can tell your product story. And there was a time when that was true, but not anymore.

You realize that simply emailing and calling advisors to tell them how great your products are is a tough way to get in the door. And even when advisors do hear the merits of your products, they're not taking action.

So, you call and email, and call and email, and call and email. You ask for a meeting, you follow up on a previous meeting, you ask them to jump on webinars. And when they don't respond, you call and email even more.

And the most frustrating part is seeing your peers have success, seemingly doing the same things as you!

Sound familiar?

Wouldn't it be great to see behind the scenes of what these top producers are actually doing? To see what's actually working based on thousands of wholesaler coaching sessions? Well then read on.

Meet Chris, He's A Top Producer.

When Chris came to me, he was both overwhelmed and frustrated. He was at the point where no matter how many more hours he worked, miles he drove, or emails he sent, his sales stayed the same.

Chris had "grinded" his way to his current level of success, but now the needle wasn't moving. His days were spent bouncing around like a ping pong ball. He was changing directions with every email, phone call, company initiative, or thought that popped in his head. Chris was running a reactive business.

LEVEL 1 - STRATEGY AND PROCESS

Creating A Strategy

The first thing Chris and I did was create a simple, weekly strategy to turn his reactive business into an intentional one.

We used a simple tool we call the Pillar System to identify a short list of activities (Pillars) where he got the biggest ROI for his time, mental energy, and effort. And the best part was, the completion of his weekly Pillars was entirely in his control.

The idea was simple.

If he completed his Pillars, he knew on Friday night, regardless of that week's sales, that he had a good week. He knew he had completed the

largest ROI activities and it was just a matter of time and pressure until he hit his goals. He had “The Friday Night Feeling!”

A Focused Process

After a few weeks, Chris realized that although his strategy was simple, he couldn't complete it by Friday. Although he was “working” every day, he couldn't find the time and focus to execute it. **Chris didn't have a process.**

Your process is the structure, rules, and tools you use to execute your weekly strategy. It considers the day-to-day of your business, both expected and unexpected. It includes how you plan your days and weeks, organize info, and protect time to work on your business.

After putting in place Chris's process to create his “Ideal Week”, a lot of his overwhelm disappeared. The foundation of his wholesaling business was in place.

LEVEL 2 - CREATING VALUE (THE MAGIC ELIXIR)

Creating Value

A big part of Chris's weekly strategy was dedicating time to becoming more valuable to advisors. We put this in place right away because being valuable makes you more effective at getting more meetings and selling more per meeting.

Very few advisors want a wholesaler to show them another floating-rate fund or variable annuity. The truth is that advisors don't have a product problem. Your product is a commodity until proven otherwise.

The result, as you've likely seen, is that it's hard to schedule meetings based on the product alone. Also, showing advisors your product, even if it's better, doesn't convert to sales as often as you need to hit your goals.

The good news is, if you're valuable to advisors, everything else gets easier. This includes getting meetings, closing sales from them, and getting referrals. Reciprocity is a very powerful social contract few wholesalers optimize for.

When Chris explained his current value add, he listed the wholesaler classics.

- Quarterly outlooks, capital market updates, etc.
- Sponsoring client events
- Portfolio reviews

I explained that in today's environment these are low value, commoditized offerings because advisors can get them from many sources (BDs, other wholesalers, the internet). I also shared that most of my wholesaling clients who previously built reciprocity with these value-adds are seeing a large drop off in effectiveness.

He then mentioned all the information his company offers on practice management and business building. They had webinars, online modules, white papers etc.

And this is where everything changed for Chris...

I explained to him that although most advisors are looking for ways to improve their business, information alone isn't that valuable. In today's world, this information is available at their fingertips via Google, podcasts, YouTube, and many more places.

What IS valuable is giving them a "weaponized" version of the info that gets them as close to a result as possible. That is, doing the legwork to simplify

the info in a way they can just apply and get a result. A “show me, don’t tell me” approach.

Realizing how critical the formatting was, Chris got to work using what we call "The Blue Apron" process to weaponize the information. The result was the creation of massively effective Value-Added Reciprocity (VAR) strategies.

The best part for Chris was that creating and delivering his VAR strategies didn’t require him to be an expert in anything! Blue Apron, Hello Fresh, and other pre-made meal services aren’t valuable to consumers because they are cooked by the best chefs. They’re valuable because of the format the meal comes in!

Extracting Value from Your Products

When I started working with Chris, he knew his products inside and out but didn’t understand why this knowledge didn’t turn into advisors wanting to learn more.

A sales 101 principle he overlooked was, "Sell the Island, Not the Boat." In other words, sell pleasure island (the benefit), not details of the boat that takes them there (the features).

So, Chris began to share directly with advisors how his products and strategies could get them a specific benefit.

He sent emails with subject lines like “A Product That May Get Nervous Money Off the Sidelines”

Then, once he got to the meeting, he filled in the features.

LEVEL 3 - GET MORE MEETINGS

When it came to getting Chris more meetings, we had a long game and short game.

The Long Game

The long game comes down to the simple fact that there are only 2 reasons an advisor won't take a meeting with you.

1. **No Value:** What you're offering isn't worth the time they'd give up meeting with you.
2. **Bad Messaging:** You have something of value. But, you can't articulate the value QUICKLY. You aren't able to do it in a subject line, a few sentences, a short voicemail, or a brief chat.

So to win the long game, you must create and extract value through the methods described above. Then, learn to create short, effective emails and voicemails that articulate this value. So as part of his weekly strategy, we not only budgeted time for Chris to become more valuable, but to learn how to craft better emails, voicemails, and stories.

Chris understood that as he became truly valuable to advisors, and was able to articulate the value quickly, getting meetings would become easier.

The Short Game (I Need Meetings Now!)

Chris bought into the long game and started working on quickly articulating the value he created and extracted. But he also needed meetings now. So, I introduced him to some of the most effective tactics he could employ on day 1.

Mailbox Money

In today's world, the least amount of competition for an advisor's attention is in the mailbox. Our tactics, including one that gets a 50% meeting rate with the largest advisors, use physical packages and letters.

Quick Hit Calls

The quick hit call is a one-to-many call/zoom. It asks the advisors to listen for a very short time (e.g. 7 minutes). You can then share a value-add strategy or a product overview. When done correctly, it's one of the most powerful tactics to fill up your calendar with individual meetings.

Great Events

Let the other wholesalers take PMs to lunch at Maggiano's while you take the time and effort to create events top advisors WANT to attend. It's amazing how just a little extra effort and creativity results in a much higher turnout.

LEVEL 4 - SELL MORE PER MEETING

Chris' calendar continued to fill up over the course of time, but the momentum and excitement of having more meetings started to fade.

Why?

Because when he followed up on these meetings.... Crickets!

So, I told him to write something on a sticky note and post it on his laptop...

“You Don’t Get Paid for Good Meetings!”

It was time for Chris to focus on the 3 keys to selling more per meeting.

1. Use VAR Strategies and other value add to build reciprocity.

I told Chris to incorporate more VAR strategies and other value add in his meetings. Because when you build reciprocity, advisors look for ways to give you business.

Chris wasn’t convinced this was the answer.

“But Brian, I just showed them how my product was better than the one they’re using, shouldn’t that be enough?”

And the answer is no. I promise, wherever you live, there are better lightbulbs than what you currently use. Better light, better for your eyes, last longer, fire safety etc.

So why won’t you spend an hour tonight researching the best light bulbs and then head to Lowes and replace all your light bulbs this weekend?

The answer is because what you have is “good enough”. And that’s why advisors don’t make the effort. It might be easy to make a change, but it’s even easier not to.

Relationships are great, but nothing overcomes resistance like the desire to reciprocate!

2. Clarifying Conversations and Follow-Up

If you play baseball or softball, you're going to see a lot of curveballs. Consequently, if you want to be successful, you're going to have to learn how to hit the curve.

If you've wholesaled for more than a week, you're going to get the "soft yes". This is when advisors don't want to say no, or make a decision, so they kick the can down the street.

They say things like: "send me some more info" "circle back next quarter" "I'll keep it on the watch list" etc.

Consequently, you should probably learn how to handle the "soft yes". And you do this with clarifying conversations. A clarifying conversation is how you go from the soft yes to the truth with just a few questions.

Mastering your clarifying conversations makes follow-up much more effective, because there are only 3 ways a meeting should end:

- You set up another short-term meeting (within a week or two)
- You position follow up as a service (detailed in the training)
- You disqualify the advisor for that product or time frame.

I told Chris, If the meeting ends any other way, you tapped out too early.

3. Effective Messaging

Many wholesalers (and other professionals) confuse comfortable with effective. Being able to tell your story and answer questions doesn't mean you're effective. It just means you're comfortable.

Consequently, we added the study of effective messaging to Chris' weekly strategy. Each week he spent time learning storytelling, persuasion, and other tactics to get advisors to see the picture he was painting and make it easy to buy.

And once he started seeing the results of some subtle changes, he started realizing how much money he had left on the table by not being as effective as possible.

LEVEL 5 - LEVERAGE

How To Build A Leveraged Business (The Top of the Mountain):

And finally the equation that took Chris' business into the stratosphere.

Input x Leverage = Output. Leverage is the multiplier in the equation.

A linear business works on addition. The more you do, the faster you run, the longer you work... the more you produce. And the truth is you can grind your way to a certain level of success with a linear business.

Eventually, though, you'll get to a place where running twice as hard doesn't produce twice the results. You'll need to start operating with multiplication to break through this ceiling and go to the next level.

If you want a business that works on multiplication and gets outsized returns, you'll have to slow down and build in leverage.

I can tell you from first-hand experience. Even wholesalers who've been in their territory for years and put up big numbers making the milk run, benefit from building in leverage.

Below are just a few examples of leverage...

- Delivering Value from a Distance (virtual)
- Quick Hit Calls (discussed above)
- Over the Top Events (discussed above)
- Fishing Tactics that Draw Advisors to You (e.g. amazing newsletter)
- Effective Outsourcing

How You Can Use the Same Roadmap as Chris

The story of Chris's success isn't random. You can clearly see how he went through the 5 levels to get to the top of the mountain.

Created His Strategy and Process

Created Value for Advisors

Learned to Get More Meetings

Learned to Sell More Per Meeting

Built Leverage into His Business

And if you'd like to incorporate these 5 levels into your business, regardless of your current situation, consider the Next Level Wholesaler program.

Next Level Wholesaler is more than just training. It's a transformative experience designed to help you build the wholesaling career you've always envisioned. Imagine having a roadmap that guides you

step-by-step, helping you break through barriers, achieve career-changing results, and set yourself up for lasting success.

Whether you're looking to streamline your processes, become more valuable to advisors, or finally reach your full potential, Next Level Wholesaler can help you get there.

Enrollment is now open. Join the program and become part of a community of top-performing wholesalers.

Sign Up Now and Start Your Journey to the Next Level!

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What You'll Get with Next Level Wholesaler Program

- **A Comprehensive Top Producers Roadmap:** Learn and implement Brian's five-level top producers system that leads to consistent growth and top producer results. These levels are a structured progression proven to transform wholesalers at any experience level.
- **Direct Access To Brian With 3 Group Training Calls Per Month:** On each call, you'll join Brian and other members of the program to get personalized feedback on your challenges, and learn from the successes of your peers. These group coaching calls are where the magic happens—you'll stay on track, overcome obstacles, and continually refine your skills.

- **Next Level Wholesaler Training Library (6 Months Access):**
Discover how professionals like Chris transformed their careers with this program's strategies. Full courses on every different aspect of growing your wholesaling business. From "How To Write Emails Advisors Actually Respond To" to "How To Get More Meetings"
- **Member-Only Resources:** In addition to the training library members get access to case studies, proven scripts, email templates, pre-made VAR strategies, invites to client only events and more.
- **BONUS: Brian's Productivity Pillar System Video Course:**
Members get access to Brians' signature Pillar system video course. The course walks you through the step by step process to create and run a focused and more intentional business. It includes everything from how to identify your pillars for success, to planning your day effectively. This simple, but powerful system is used by top producers across the country and has been licensed by some of the largest companies in the industry.

Sign Up Now and Start Your Journey to the Next Level!

[CLICK HERE TO LEARN MORE](#)

I engaged with Brian through his NLW program to build a weekly strategy/framework for a territory I'd been in for about 10 months. Not only did we triple sales in year 2, but I was able to reduce the overwhelm that I had experienced in year 1.

Jeremy M – Annuity Wholesaler

I've been in the sales management/training side of the insurance and asset industry for almost 20 years and have worked with many different coaches. In all this time Brian's coaching BY FAR stands out as the most practical, tactical, and deployable on day one to get results.

Jeff L – Head Trainer Sales Enablement

I've gone from consistently ranking in the top 6-8 to being number 1 for the past two years. I've never had more day-to-day clarity on what to do. His approach has truly elevated both my performance and work-life balance.

Hutson M – Fund Wholesaler

Prior to working with Brian I was a "C" wholesaler. Today, I'm consistently in the top 3rd ...which was always my goal.

Kevin B – Wholesaler

How Next Level Wholesaler Works

The program is structured into five comprehensive levels. Each level builds on the previous one, guiding you through the exact process top wholesalers use to achieve consistent growth. Let's dive into what each level offers and how it will transform your approach.

Level 1: Strategy & Process—Building Your Foundation

When wholesalers like Chris come to us, they're often stuck in a cycle of endless tasks, long hours, and stagnant results. Chris used to spend his

days reacting to every email, call, and new initiative that came his way. The result? He was burnt out, and his sales weren't moving.

In Level 1, we focus on creating a structured weekly strategy that makes your work intentional rather than reactive. Using Brian's "Pillar System," you'll identify high-impact activities—your "pillars"—that yield the greatest return on investment for your time and energy. With your weekly strategy in place, you'll also build a personal process (using the "Ideal Week" method) that allows you to execute consistently. Chris, like many others, saw the immediate benefit: he was in control of his work, and his days were productive, not chaotic.

By the end of Level 1, you'll have a solid foundation. You'll know exactly what you need to do each week, why it matters, and how to get it done.

Level 2: Creating Value (The Magic Elixir)

Once you have a clear strategy, the next step is to focus on creating real value for advisors. In today's world, advisors don't need another generic product update or quarterly outlook. They want insights they can act on—valuable strategies they can implement immediately.

When Chris joined, his value-add was limited to "the basics," like market updates, event sponsorships, portfolio reviews, and practice management *information*.

Through the Next Level Wholesaler program, Chris learned how to use the Blue Apron process to weaponize practice management and business building information. The result was a tool belt of simple value adds (VAR Strategies) that advisors could put into action immediately.

In Level 2, you'll discover how to create the high-impact VAR (value adds) strategies that help you get in the door and turn good meetings into sales.

Level 3: Get More Meetings

Level 3 focuses on securing meetings consistently. The program teaches a dual approach: the long game and the short game.

The Long Game: You'll learn how to create and communicate your value clearly and quickly—through powerful email subject lines, short voicemails, and compelling conversations. The aim? To make it clear to advisors why meeting with you is worth their time.

The Short Game: For wholesalers who need meetings immediately, the program includes high-conversion tactics like “Mailbox Money” (physical mail that cuts through the digital noise), “Quick Hit” calls, which allow you to engage multiple advisors in one shot, and great in-person and virtual events.

Level 4: Selling More Per Meeting

Once you're consistently getting meetings, it's time to double down on getting paid more per meeting! Level 4 teaches you how to turn good meetings into sales. In the program, you'll learn how to use VAR strategies to build reciprocity, turn the “soft yes” into the truth with clarifying conversations, and master follow up..

Level 5: Building Leverage

The final level is about leverage, and it's where true career transformation happens. You'll learn how to shift from a linear approach—where results are based on time—to a leveraged approach, where your efforts multiply.

Using virtual meetings, quick-sorting tactics, and other strategies, you'll be able to scale your impact without overextending yourself. Chris's transition to a leveraged business allowed him to achieve consistent growth and scalability without increasing hours.

Proven Results: Success Stories from Wholesalers Like You

The Next Level Wholesaler program has changed the lives of many professionals. Take Chris, for example. When he joined, he was an overwhelmed wholesaler feeling burnt out and stagnant. Today, thanks to the strategies and support he found in the program, Chris is a top performer in his company, and he's found new levels of satisfaction and fulfillment in his work.

Prior to joining NLW, I was trying to find ways to engage more RIAs. Today, I have significantly increased the number of meetings using just a few of the tactics Brian shared.

Robert H – Annuity Wholesaler

Before working with Brian, I constantly questioned my approach and changed directions and strategies. In a short time, his coaching and NLW program helped me implement a clear system that DOUBLED my sales and positioned me for advancement!

Ryan R – Annuity Wholesaler

Before I joined NLW and started working w/Brian, I was flying by the seat of my pants...with ZERO system. Even when I had a strong year, I wasn't sure if or how I could repeat it. Brian changed all that. I now run an intentional business....and not only has my income increased dramatically, so has my peace of mind.

Michael J – Fund Wholesaler

After utilizing Brian's methods of getting more appointments through better crafted emails and subject lines, Non-Sale Touches, and Star/Wow Mailers I've improved my face-to-face meeting rate by over 50%!

Art B – Annuity Wholesaler

Like Chris and the others, you'll find a path to higher profitability, greater work-life balance, and a clearer sense of purpose in your career. Imagine not just surviving as a wholesaler, but thriving.

Ready to Take the Next Step?

Whether you're looking to streamline your processes, become more valuable to advisors, or finally reach your full potential, Next Level Wholesaler can help you get there.

Enrollment is now open. Join the program and become part of a community of top-performing wholesalers.

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Created by Brian Margolis, a former environmental scientist turned successful entrepreneur, this program is a refined curriculum drawn from decades of real-world experience.

Over the last decade plus, Brian has conducted thousands of individual wholesaler coaching sessions and worked with countless asset managers and insurance companies. Through these experiences, he identified the key strategies that truly move the needle, even in challenging market conditions.

His book, “**The Index Card Business Plan for Sales Pros and Entrepreneurs**”, laid the foundation, and Next Level Wholesaler builds on that foundation with in-depth training, real-world examples, and actionable steps to elevate your game.