

SALES SUCCESS  
BOOTCAMP

# Agenda



# Day 1

Time	Topic
8:00 – 9:00 AM	<b>Welcome, Introductions, and Orientation</b> <ul style="list-style-type: none"><li>▪ The Vision</li><li>▪ The Structure to Support Rapid Growth</li></ul>
9:00 – 10:00 AM	<b>The Advisor's Model Day</b> <ul style="list-style-type: none"><li>▪ The Value of the Advisor's Time</li><li>▪ Planning for Maximum Production</li><li>▪ Leverage a Team and Technology</li></ul>
10:00 – 10:15 AM	<b>Break</b>
10:15 – 12:00 PM	<b>Creating and Sustaining the Advisor's Three Identities</b> <ul style="list-style-type: none"><li>▪ Overview of Branding</li><li>▪ The Expert Advisor Identity</li><li>▪ The Caring, Trustworthy, Well-Mannered Individual Identity</li><li>▪ The Good Citizen Identity</li><li>▪ The Brag Wall</li></ul>
12:00 – 1:00 PM	<b>Lunch</b>
1:00 – 2:45 PM	<b>Prospecting Strategy Overview</b> <ul style="list-style-type: none"><li>▪ Recipe for Prospecting Success</li><li>▪ Maximize Introductions and Referrals</li><li>▪ Relationship Marketing Strategies</li><li>▪ Overview of Six Other Prospecting Strategies</li></ul>
2:45 – 3:00 PM	<b>Break</b>
3:00 – 4:00 PM	<b>Prospecting Strategy (Continued)</b>



# Day 2

Time	Topic
8:00 – 9:00 AM	<b>Staging the Office</b> <ul style="list-style-type: none"><li>▪ Location, Location, Location</li><li>▪ The Welcome Sign</li></ul>
9:00 – 10:00 AM	<b>Your Digital Footprint</b> <ul style="list-style-type: none"><li>▪ The Tenets of Be Found, Look Good</li><li>▪ Five Ways Your Web Presence Prepares your Prospect</li></ul>
10:00 – 10:15 AM	<b>Break</b>
10:15 – 11:00 AM	<b>The Appointment Process</b> <ul style="list-style-type: none"><li>▪ Understanding the Meeting Cycles</li><li>▪ Prepping the Prospect</li><li>▪ Due Diligence Before Meeting</li><li>▪ Creating an Agenda</li><li>▪ Advisor Prep Day Of</li></ul>
11:00 – 12:00 PM	<b>Documents to Prep</b> <ul style="list-style-type: none"><li>▪ The Three Step Credential Presentation</li><li>▪ Creating Your “Brochure”</li><li>▪ Your Expert Library</li><li>▪ Your Mission Critical Questionnaire</li></ul>
12:00 – 1:00 PM	<b>Lunch</b>
1:00 – 2:30 PM	<b>Your Value Statement</b> <ul style="list-style-type: none"><li>▪ What Makes You Different</li><li>▪ Why You Should be Driven by Why and What, not How</li><li>▪ Workshop Your Statement</li></ul>
2:30 – 2:45 PM	<b>Break</b>
2:45 – 4:00 PM	<b>The Discovery Meeting</b> <ul style="list-style-type: none"><li>▪ Chit Chat</li><li>▪ Presenting Credentials</li><li>▪ Bridging to a Questionnaire – Your First Question</li></ul>



# Day 3

Time	Topic
8:00 – 9:00 AM	<b>The Discovery Meeting (continued)</b> <ul style="list-style-type: none"><li>▪ Asking Null Questions</li><li>▪ Personal Questions</li><li>▪ NOC (Non-Optimal Condition)</li><li>▪ The Art of Note Taking</li></ul>
9:00 – 10:15 AM	<b>Role Play Question Asking</b> <ul style="list-style-type: none"><li>▪ Developing your Ideal Questions</li><li>▪ Using Your Questions</li></ul>
10:15 – 10:30 AM	<b>Break</b>
10:30 – 12:00 PM	<b>Discovery Meeting Close</b> <ul style="list-style-type: none"><li>▪ Building Momentum to Close</li><li>▪ Developing Your List of Standby Trial Closes</li><li>▪ The Homework Close</li><li>▪ The Pain Point Close</li><li>▪ Setting the Next Appointment</li></ul>
12:00 – 1:00 PM	<b>Lunch</b>
1:00 – 2:30 PM	<b>The Homework</b> <ul style="list-style-type: none"><li>▪ Assignment Reminders</li><li>▪ Analyzing the Data</li><li>▪ Prepare Your Implementation Steps</li><li>▪ Prepare Your Education Plan</li><li>▪ Preparing a Simple Financial Plan</li><li>▪ Writing an Effective Proposal</li></ul>
2:30 – 2:45 PM	<b>Break</b>
2:45 – 4:00 PM	<b>Education</b> <ul style="list-style-type: none"><li>▪ Educating Your Prospect the Good Way</li></ul>



# Day 4

Time	Topic
8:00 – 9:45 AM	<b>Making Recommendations</b> <ul style="list-style-type: none"><li>▪ Presenting the Written Proposal</li><li>▪ How You Solve Pain</li></ul>
9:45 – 10:00 AM	<b>Break</b>
10:00 – 11:00 AM	<b>Role Play Education/Close</b> <ul style="list-style-type: none"><li>▪ Presenting 5 Common Pain Points</li><li>▪ Prepare Written Proposal</li><li>▪ Presenting 5 Common Pain Points</li><li>▪ Prepare a Written Proposal</li></ul>
11:00 – 12:00 PM	<b>Handling Objections</b> <ul style="list-style-type: none"><li>▪ Question Answering</li><li>▪ “Let me Think About It” Script</li><li>▪ Interviewing Other Advisors Script</li><li>▪ Costs Script</li></ul>
12:00 – 12:30 PM	<b>Close</b>

