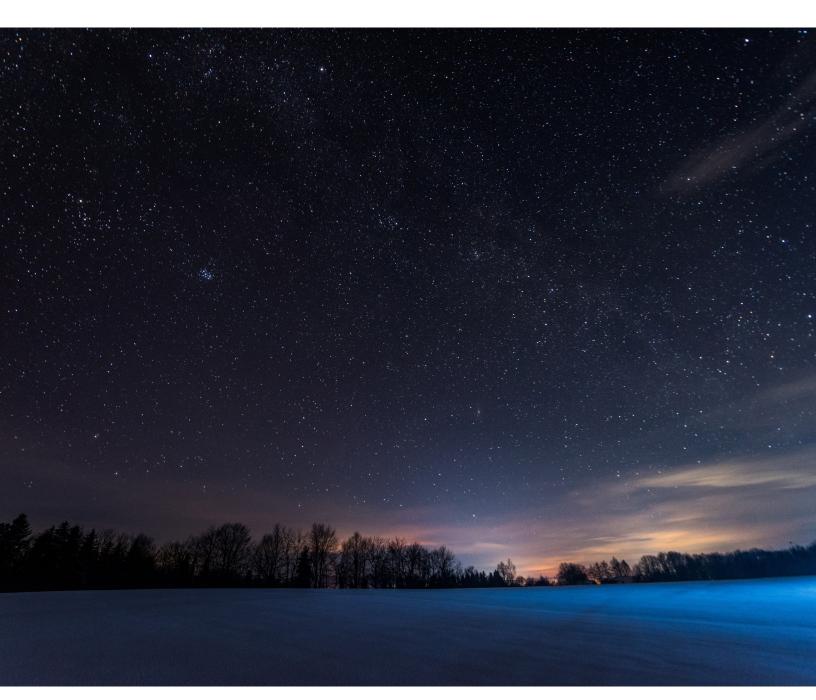
SALES SUCCESS BOOTCAMP

Agenda





Time	Topic
8:00 – 9:00 AM	Welcome, Introductions, and Orientation
	The Vision
	 The Structure to Support Rapid Growth
9:00 - 10:00 AM	The Advisor's Model Day
	 The Value of the Advisor's Time
	 Planning for Maximum Production
	 Leverage a Team and Technology
10:00 – 10:15 AM	Break
10:15 – 12:00 PM	Creating and Sustaining the Advisor's Three Identities
	Overview of Branding
	The Expert Advisor Identity
	 The Caring, Trustworthy, Well-Mannered Individual Identity
	 The Good Citizen Identity
	■ The Brag Wall
12:00 – 1:00 PM	Lunch
1:00 – 2:45 PM	Prospecting Strategy Overview
	 Recipe for Prospecting Success
	 Maximize Introductions and Referrals
	 Relationship Marketing Strategies
	Overview of Six Other Prospecting Strategies
2:45 – 3:00 PM	Break
3:00 – 4:00 PM	Prospecting Strategy (Continued)



Time	Topic
8:00 - 9:00 AM	Staging the Office
	Location, Location
	■ The Welcome Sign
9:00 - 10:00 AM	Your Digital Footprint
	The Tenets of Be Found, Look Good
	 Five Ways Your Web Presence Prepares your Prospect
10:00 – 10:15 AM	Break
10:15 – 11:00 AM	The Appointment Process
	 Understanding the Meeting Cycles
	Prepping the Prospect
	 Due Diligence Before Meeting
	Creating an Agenda
	 Advisor Prep Day Of
11:00 – 12:00 PM	Documents to Prep
	 The Three Step Credential Presentation
	■ Creating Your "Brochure"
	Your Expert Library
	Your Mission Critical Questionnaire
12:00 – 1:00 PM	Lunch
1:00 – 2:30 PM	Your Value Statement
	What Makes You Different
	Why You Should be Driven by Why and What, not How
	Workshop Your Statement
2:30 - 2:45 PM	Break
2:45 - 4:00 PM	The Discovery Meeting
	Chit Chat
	 Presenting Credentials
	 Bridging to a Questionnaire – Your First Question



Time	Торіс
8:00 - 9:00 AM	The Discovery Meeting (continued)
	 Asking Null Questions
	Personal Questions
	 NOC (Non-Optimal Condition)
	The Art of Note Taking
9:00 - 10:15 AM	Role Play Question Asking
	 Developing your Ideal Questions
	Using Your Questions
10:15 - 10:30 AM	Break
10:30 – 12:00 PM	Discovery Meeting Close
	 Building Momentum to Close
	 Developing Your List of Standby Trial Closes
	■ The Homework Close
	■ The Pain Point Close
	Setting the Next Appointment
12:00 – 1:00 PM	Lunch
1:00 – 2:30 PM	The Homework
	 Assignment Reminders
	 Analyzing the Data
	 Prepare Your Implementation Steps
	Prepare Your Education Plan
	Preparing a Simple Financial Plan
	 Writing an Effective Proposal
2:30 - 2:45 PM	Break
2:45 – 4:00 PM	Education
	 Educating Your Prospect the Good Way



Time	Topic
8:00 - 9:45 AM	Making Recommendations
	 Presenting the Written Proposal
	 How You Solve Pain
9:45 - 10:00 AM	Break
10:00 – 11:00 AM	Role Play Education/Close
	Presenting 5 Common Pain Points
	Prepare Written Proposal
	Presenting 5 Common Pain Points
	Prepare a Written Proposal
11:00 – 12:00 PM	Handling Objections
	Question Answering
	"Let me Think About It" Script
	 Interviewing Other Advisors Script
	Costs Script
12:00 – 12:30 PM	Close

