

SALES SUCCESS
BOOTCAMP

Agenda



Day 1

Time	Topic
8:30 – 9:00 AM	Welcome, Introductions, and Orientation <ul style="list-style-type: none">▪ The Vision▪ The Structure to Support Rapid Growth
9:00 – 10:00 AM	The Advisor's Model Day <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ 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)



Day 2

Time	Topic
8:30 – 9:00 AM	Staging the Office <ul style="list-style-type: none">▪ Location, Location, Location▪ The Welcome Sign
9:00 – 10:00 AM	Your Digital Footprint <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ Chit Chat▪ Presenting Credentials▪ Bridging to a Questionnaire – Your First Question



Day 3

Time	Topic
8:30 – 9:00 AM	The Discovery Meeting (continued) <ul style="list-style-type: none">▪ Asking Null Questions▪ Personal Questions▪ NOC (Non-Optimal Condition)▪ The Art of Note Taking
9:00 – 10:15 AM	Role Play Question Asking <ul style="list-style-type: none">▪ Developing your Ideal Questions▪ Using Your Questions
10:15 – 10:30 AM	Break
10:30 – 12:00 PM	Discovery Meeting Close <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ 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 <ul style="list-style-type: none">▪ Educating Your Prospect the Good Way



Day 4

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

