
LAUNCHPAD
Agenda
SALT LAKE CITY

Day 1

8:30a	**The Vision and Numbers** In our morning session we are going to show you how far you will be able to take your practice. Whether you are pushing to double your production or looking to work less (or maybe even a combination of both), we are going to show you how others have done it. We will also give you the steps to planning out your own path.
10:00a	**Client Segmentation & Service Model** One of the keys to experiencing growth without plateaus is to make sure you take good care of clients, in a productive way. The best way we have found to do this is by setting up service models. In this session we will teach you how to segment your clients based on specific criteria (not just asset-based) and create a service model that provides each client tier with exceptional service.
12:00p	**LUNCH**
1:00p	**Client Engagement** In one of the pre-launchpad webinars we covered how to retain clients using the Client Retention Formula. That means you make them happy. But happy clients are only the first step to getting referrals. Only engaged clients will refer. That's what the Client Engagement Formula is all about. In this session we will break down each part of the formula and how to implement it in your office.
3:30p	**Promoting Referrals** With clients happy and engaged, it's time to let them know to send in the referrals. But- ***we never ask!*** We promote using multiple different methods and channels. In this session we will show you the strategies involved to get at least 15% of your clients to refer their friends and family to you each year.
5:00p	**End of Day**

Day 2

8:30a	**Introductions** What's better than a client referral? An introduction. A referral is where you get a name of someone to call. An introduction is when your client takes the opportunity to introduce you to their friend. There is a clear method for how to get this done and during this session we will break it down for you.
10:00a	**Relationship Mapping** Relationship Mapping is the process of connecting individuals within households to individuals of other households due to some common connection. That connection can come because of a similar alma mater, neighborhood, work, club, charitable organization involvement, sport, art class, etc. In this session you will learn how to identify potential influencers, develop deeper relationships with clients, plan and execute productive events, and powerfully network for introductions.
11:00a	**COIs & Strategic Partnerships** Many advisors have a list of COIs and "strategic partnerships" (which are typically really strategic one-way-streets). However, they are not getting anything from either group. This can be a valuable source of new business. We have a tested and proven steps to make these relationships work. We will walk you, step-by-step, through the process so you can capitalize on the relationships you have.
12:00p	**LUNCH**
1:00p	**Sales Process** Top advisors close over 60% of the new prospects who come in to meet with them. In fact, most of the top teams we work with close well into the 90% range. In this session, we will walk you through the Good Way to Sell process that will get you into that range.
3:00p	**Mass Marketing** In order to keep a consistently flowing pipeline you must have several prospecting channels working at the same time. In many offices looking

to grow their business mass marketing becomes at least one of the channels used. During this session we will talk about direct mail, cold calling, and TIPPing. We will discuss the campaign variables that will make or break your efforts in these areas.

5:00p **End of Day**

Day 3

8:30a **Seminars & Webinars**

We will walk you through each of the 6 critical stats of the seminar success zone. If you can get all of your stats within the ranges using the proven techniques we will give you, your seminars will be highly profitable.

While very similar to seminars, they clearly are not the same. Working with many advisor teams over the last couple of years, we have found the best way to run your webinars. We will show you how to get results.

Our mantra in the digital space has long been:" Be found and look good." We will show you how, while maintaining compliance, you can make your site stand out. We will then visit your pages and give you some tips and changes you can make immediately to really boost your site.

11:00a **Business Transitions**

Every business goes through transitions. Sometimes it is buying a book of business. Sometimes it is preparing a book to be sold. We will walk you through the best practices in each of these areas.

12:00p **LUNCH**

1:00p **Online Presence**

While social media has been a valid form of branding and communicating in our industry for a while, many don't know how to use it. In this session, we will go over your social media strategy. You will learn the importance of a good profile, how to create great posts, and how to use social media to build momentum for your other campaigns.

3:00p **Strategy Plan Session**

During this session you will meet with a Senior Coach to discuss and plan out the strategies you want, and need, to implement in your office to reach your goals.

You will leave the class with a strategy plan in place that you and your coach will work to implement over the next 6 to 9 months.

5:00p **End of Day**