# The Virtual Client Acquisition Mastery Workshop Experience 2020

AdvisorRoadmap
Virtual Training for Financial Advisors
Elevate Client Value. Grow Your Business. Be A Fiduciary.

Detailed Agenda
Starts July 1, 2020

## A Guided Practice Environment with like-minded, motivated financial professionals engaged in interactive, experiential learning to accelerate results.

"The greatest antidote to fear is competence." - Chris Hadfield, Astronaut

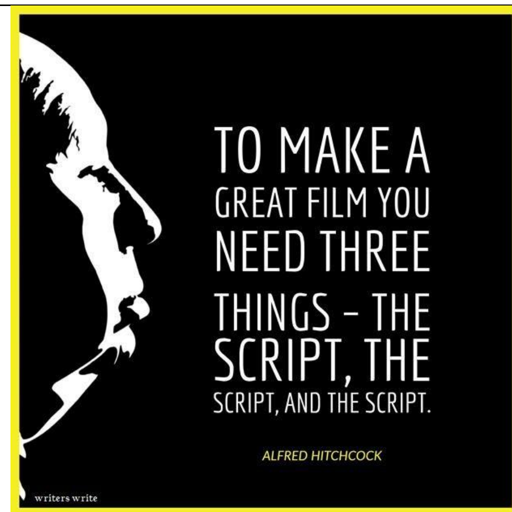
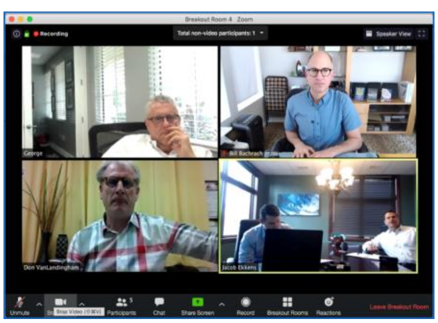
The promise of the Client Acquisition Mastery Workshop ("Dojo") is simple: You will develop *more skill, more confidence, and more competence* with the 7 critical conversations and the Financial Road Map so you can more consistently and predictably acquire Ideal Clients (and Non-Ideal Clients, if you still need them.) You will get exactly that, and more.

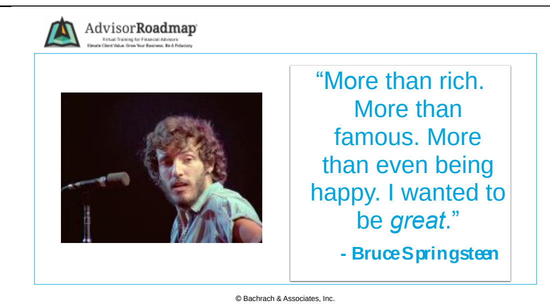
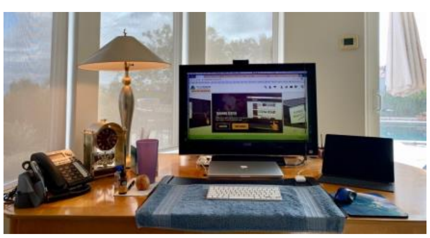
The more you practice, and the sooner you start practicing, the more success you will have. Whether practicing in a face-to-face or virtual environment, you will develop more competence that translates into better results in the real world in both face-to-face and virtual prospect and client meetings.

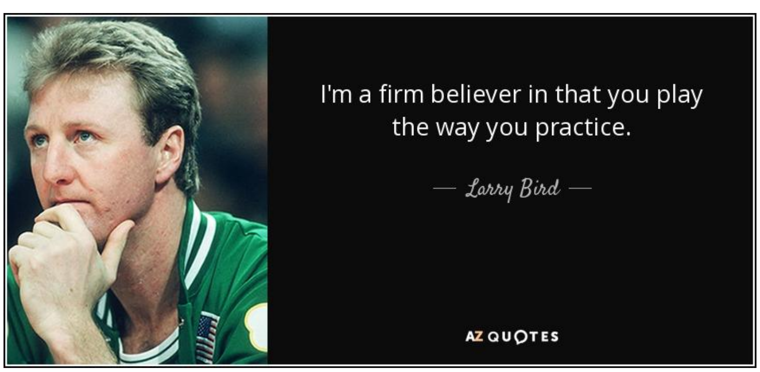
Given the current reality for conferences, your options are no practice or virtual practice. Which do you think will get you more Ideal Clients in 2020? How much is one Ideal Client worth… this year and lifetime value?

50% more training and practice time has been added to the normal Client Acquisition Mastery workshop agenda. Another benefit of going virtual is that you can record everything, including 30 paired practice sessions with a variety of partners, directly to your computer for self-coaching and improvement.

Register today at
www.youradvisorroadmap.com/dojo/
619-255-4888

| Day One; Wednesday, July 1st – *All Times US Pacific Daylight Time* | |
|---|---|
| 9:30 – 9:55a | Registration & Welcome. Making the most of this learning experience. |
| 10:00- 11:00a<br> | **Improve Your Script Binder to Accelerate Results**<br>In this session you will learn the most important things the Committed Advisors do to make their script binders an enormously valuable asset in the journey to building an Ideal Business with Ideal Clients.<br>You can record this session directly to your computer for future review and learning.<br>Q&A. |
| 11:00 – 11:15a<br>Break | <br> |
| 11:15a – 12:15p<br> | **Breakout Rooms:** You'll be placed into breakout rooms with a few other participants and a member of our team to personally support you to ensure your script binder is up-to-date and organized efficiently.<br>You will become more familiar and comfortable with your script binder, be more prepared to practice during the Dojo, and more confident about getting your next Ideal Client…and the one after that, and so on.<br>You can record your breakout room session directly to your computer for future review and learning.<br>Coaching tips.<br>Q&A. |

| Day Two; <u>Wednesday, July 15th</u> – *All Times US Pacific Daylight Time* | |
|---|---|
| 9:45 – 9:55a | Day Two: Welcome Back! |
| 10:00- 11:00p<br><br> | **Mastering Virtual Meetings**<br>You will create, or improve, your personal action checklist to prepare for and conduct effective virtual meetings with prospects and clients.<br>You can record this session directly to your computer for future review and learning.<br>Q&A. |
| 11:00 – 11:15a<br>Break | <br> |
| 11:15a – 12:15p<br> | **Breakout Room:** You will receive personal attention from our team to help you optimize your individual environment for virtual meeting success with prospects and clients. This will also help you and all of the other participants be ready to maximize virtual paired practice.<br>You can record your breakout room session directly to your computer for future review and learning.<br>Coaching + Q&A. |

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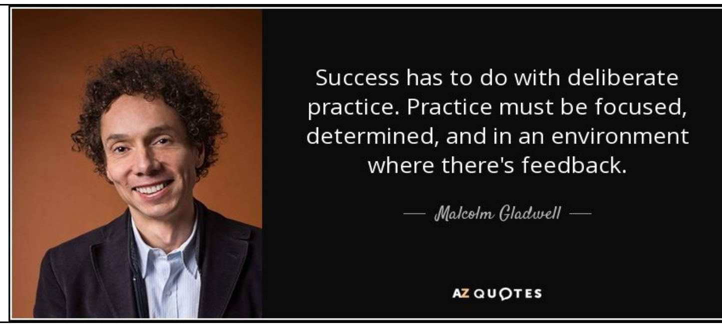
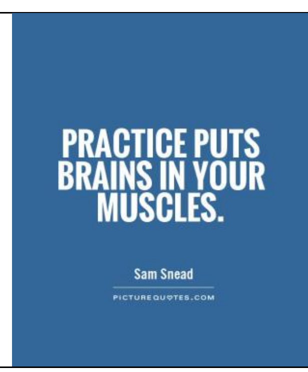
<table>
<tr><th colspan="2">Day Three; Wednesday, July 29th – All Times US Pacific Daylight Time</th></tr>
<tr><td>7:45 – 7:55a</td><td>Day Three: Welcome back!</td></tr>
<tr><td>8:00 - 9:15a<br><br><br></td><td>Keynote Presentation by Bill Bachrach: The Art & Science of Talking to Anyone, Any time, Any where. Move the needle on the “trust dial” in the right direction, especially with the HNW.<br>You can record this presentation directly to your computer for future review and learning.<br>Q&A.<br>Preparing for Paired Practice.</td></tr>
<tr><td>9:15 - 9:30a<br>Break</td><td><br></td></tr>
<tr><td>9:30 - 10:45a<br></td><td>Paired Practice: Critical Conversation #1<br>You will practice Crit Con 1 multiple times with different partners. As a result, you will develop more skill and confidence to engage new people you meet at charity events, on airplanes, at fundraisers, at weddings or any other place where a chance encounter could be the first step to your next Ideal Client. You will move the needle on the trust dial without ever coming across like a salesperson or typical financial advisor trolling for business.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A.</td></tr>
<tr><td>10:45 - 11:00a<br>Break</td><td><br></td></tr>
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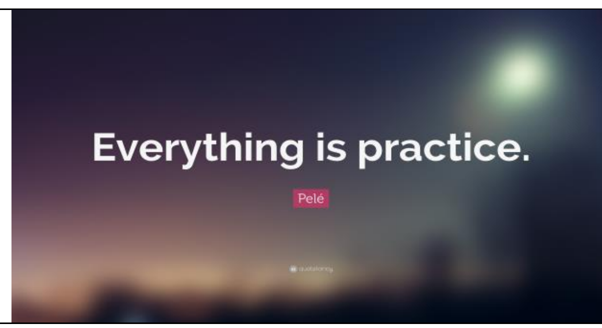
|---|---|
| 11:00a - 12:15p<br> | **Paired Practice:** Critical Conversation #1.<br>The more you practice the better you get.<br>You will practice multiple times with different partners to continue to build your skill and confidence to talk to any one, any time, any where.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 12:15 - 1:15p | **Lunch:** Pull up a seat at your virtual lunch table, enjoy your lunch, and network with your fellow advisors. |
| 1:15 – 2:30a<br> | **Paired Practice:** Critical Conversation #2<br>Also known as the "Phone Consultation."<br>You will improve your skill at creating a phone or virtual meeting experience that results in scheduling more Financial Road Map interviews where people come to your office, with both spouses, and all of their financial documents.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 2:30 - 2:45p<br>Break |  |
| 2:45 – 4:00p<br> | **Paired Practice:** Critical Conversation #2<br>The more you practice the better you get.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 4:15 – 5:15p | **Virtual Happy Hour –** Bring your favorite drink and join your fellow financial advisors for this great 'ice-breaker' event as we get to know each other better during this virtual Happy Hour. |

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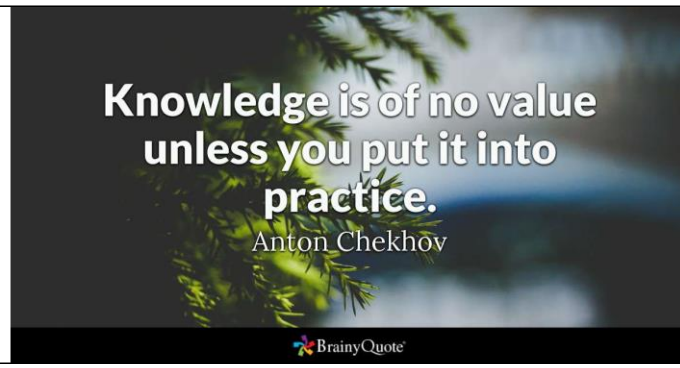
| Day Four; Wednesday, August 5th – *All Times US Pacific Daylight Time* | |
|---|---|
| 7:45 – 7:55a | Day Four: Welcome Back! |
| 8:00 - 9:15a<br> | Keynote Presentation by Bill Bachrach: **The Work Habits of the Most Successful Financial Advisors**. The purpose of this session is to help you maximize your Client Acquisition time.<br>You can record this presentation directly to your computer for future review and learning.<br>Q&A. |
| 9:15 - 9:30a<br>Break |  |
| 9:30 - 10:45a<br> | **Paired Practice:** Critical Conversation #3 – The Opening Conversation<br>How you open the initial prospect or client interview is key to elevating your credibility, distinguishing yourself from other advisors, and paving the way for a positive experience. Do this well and you are more likely to be hired in this first meeting and clients are more likely to consolidate all of their business with you. This is where you start to shift investment-oriented client relationships to full-service financial planning relationships.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q&A. |
| 10:45 - 11:00a<br>Break |  |

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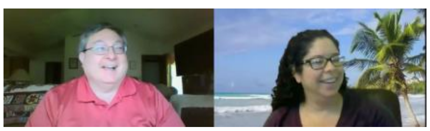
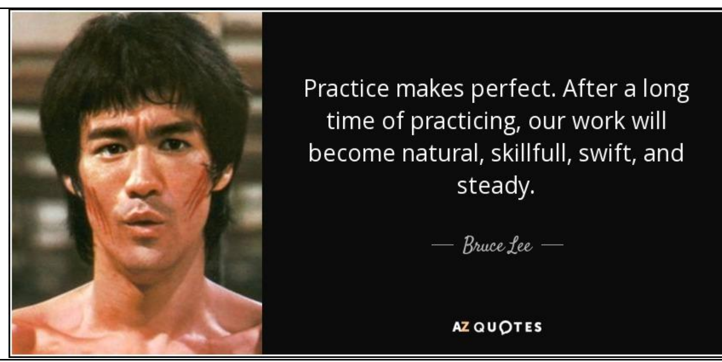
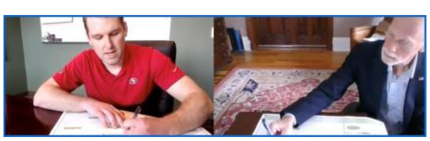
|---|---|
| 11:00 - 12:15p<br> | **Paired Practice:** Critical Conversation #4 – The Values Conversation<br>“What’s important about money to you?”<br>Values are the emotional “why” that inspire people to make their most important decisions. Like whether or not they are going to hire you, fire their other advisors, consolidate all of their business with you, follow your advice, and refer you to their friends. In this session you will practice asking the most engaging and emotionally compelling questions of each spouse / partner and really listen with true empathy in a way that continues to distinguish you from other advisors.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 12:15 - 1:15p | **Lunch:** Have a seat at your virtual lunch table, enjoy your lunch, and network with your fellow advisors. |
| 1:15 – 2:30p<br> | **Paired Practice:** Critical Conversation #4 – The Values Conversation<br>The more you do it the better you get.<br>Practice = Skill = Confidence = Competence = Results.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 2:30 - 2:45p<br>Break | <br> |
| 2:45 - 4:00a<br> | **Paired Practice:** Critical Conversation #4 – The Values Conversation with Pre-Commitment.<br>By effectively summarizing the most deeply held values of each spouse / partner you create a compelling and inspiring vision of what a great advisor / client relationship looks like, sounds like, and feels like. As well as a strong sense of commitment that it’s you they want this kind of relationship with.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |

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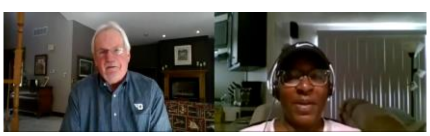
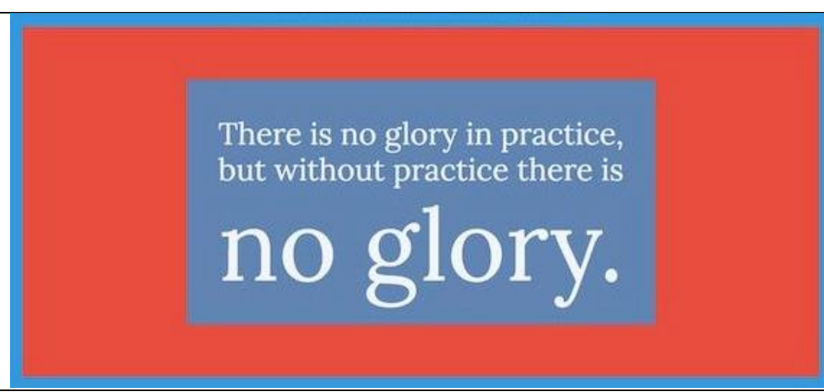
| **Day Five; Thursday, August 6th – *All Times US Pacific Daylight Time*** | |
|---|---|
| 7:45 – 7:55a | Day Five: Welcome Back! |
| 8:00 - 9:15a<br> | **Paired Practice:** Critical Conversation #5 – The Goals Conversation<br>There’s a lot of *talk* about “goals-based planning” these days, but most of it is pretty weak. The Values-Based Financial Planning goals conversation is much more personal, specific, and compelling than what is commonly used by most FAs. You can much more effectively inspire prospects to become clients and clients to act on your advice. Goals are the tangible “what” that complement the emotional “why” of their values. The combination of their most important goals and most deeply held values creates a powerful force to help your clients make the next smart choices about their money: to hire you and fire their current Financial Advisor(s).<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 9:15 - 9:30a<br>Break |  |
| 9:30 - 10:45a<br> | **Paired Practice:** Critical Conversation #6 – All The Money Conversation<br>How to artfully handle the financial documents and benchmark their current financial reality in a way that increases your credibility, confirming their initial impressions of your competence and trustworthiness.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 10:45 - 11:00a<br>Break |  |

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|---|---|
| 11:00a - 12:15p  | **Paired Practice:** Putting it all together – Complete a full Financial Road Map Interview.<br>Now you will practice the entire initial interview: The Opening, the Values Conversation, Goals Conversation, and the All the Money exercise put you in the perfect position to put an offer on the table to become their Trusted Advisor. Prospects will hire you in the first meeting and existing clients will upgrade by engaging in a full-service, planning relationship, consolidating all of their business with you.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 12:15 - 1:15p | **Lunch:** Pull up a seat at your virtual lunch table, enjoy your lunch, and network with your fellow advisors. |
| 1:15 - 2:30p  | **Paired Practice:** Complete a full Financial Road Map Interview.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 2:30 - 2:45p<br>Break |  |

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|---|---|
| 2:45 - 4:00p<br> | **Paired Practice:** Critical Conversation #7 – Commitment to Hire<br>Powerfully articulate your client value promise. Now that your clients' values, goals, and current financial reality are laid out nicely in front of them on their Financial Road Map, it's time to put your offer on the table. You will practice articulating your client value promise in the context of their most important goals and most deeply held values and answering the two key questions, "how much does it cost?" and "what do I get?" You will be able to do this in a way that is totally transparent, is consistent with the fiduciary standard, and establishes clear expectations. Assuming they meet your Ideal Client Profile and you want them as a client, do this well and you are much more likely to hear, "let's get started now." Rather than, "we need to think it over."<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 4:15 – 5:15p | **Guest Speaker (TBD) –** Success leaves clues and who better to give you these clues than a Committed Advisor who has built their Ideal Life? This bonus 'after-hours' will feature a Committed Advisor who has built their Ideal Business and will feature plenty of Q & A time. |


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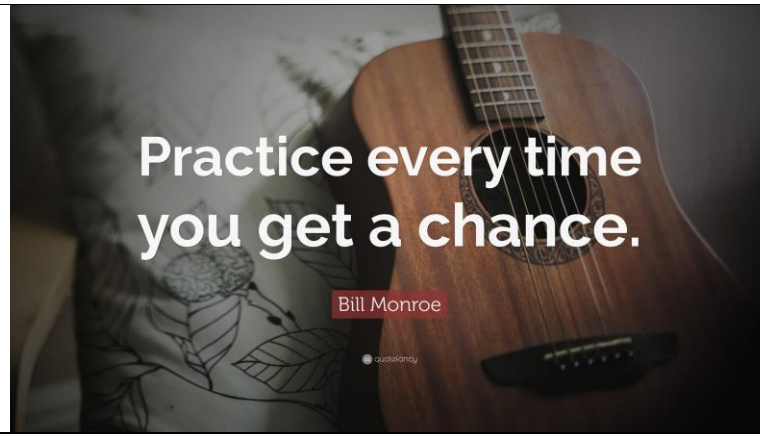
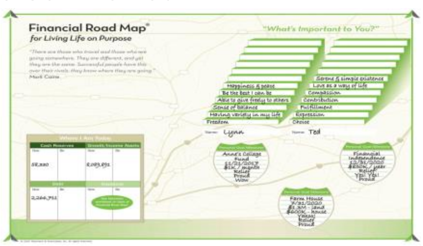
| Day Six; Friday, August 7th – *All Times Pacific (PDT)* | |
|---|---|
| 7:45 – 7:55a | Day Six Welcome |
| 8:00 - 9:15a<br> | **Paired Practice:** Critical Conversation #7 – Commitment to Hire<br>The more you do it, the better you get.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A. |
| 9:15 - 9:30a<br>Break |  |
| 9:30 – 10:45a<br> | **Paired Practice:** Putting it all together – Complete a full Financial Road Map Interview, including Commitment to Hire. Critical Conversations 3 – 7.<br>Now you will practice the entire Financial Road Map Interview. The Opening, the Values Conversation, Goals Conversation, the All the Money exercise, and Commitment to Hire.<br>You can record your paired practice directly to your computer for future review and improvement.<br>Coaching Tips + Q & A |
| 10:45 - 11:00a<br>Break |  |

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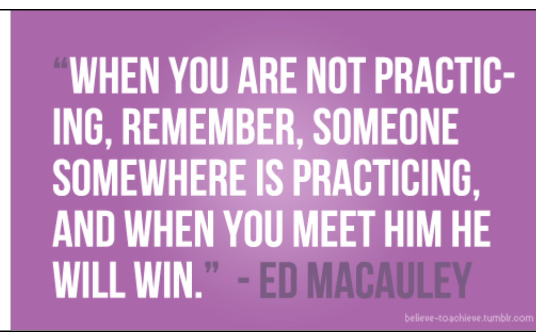
|---|---|
| 11:00a - 12:15p<br> | Keynote Presentation by Mark Little: **The Fundamental Concepts of Truly Comprehensive Services**. As one of the most successful implementers of Values-Based Financial Planning® ever, and now the president of Advisor PACT™, Mark brings a unique perspective to the meaning of "*Truly* Comprehensive Financial Services." By learning to provide four things clients want most, but can't get at any price: Protection, Attention, Coordination, and Transparency. “Excellence looks like a standard that exceeds your client’s expectations.”<br>You can record this presentation directly to your computer for future review and learning.<br>Q&A |
| 12:15 - 1:15p | **Lunch:** Have a seat at your virtual lunch table, enjoy your lunch, and network with your fellow advisors. |
| 1:15 - 2:30p<br> | Keynote Presentation by Anne Bachrach, THE Accountability Coach™: **Proven Systems for Making More Money, Working Less, and Enjoying Better Work Life Balance.** As the personal Accountability Coach for the Committed Advisors and the leader of the Accountability Groups, Anne knows exactly what you need to do in order to maximize your results.<br>You can record this presentation directly to your computer for future review and learning.<br>Q&A. |
| 2:30 - 2:45p<br>Break |  |
| 2:45 – 4:00p<br> | Q&A. Before you’re done you want to make sure you have the answers to all your burning questions. This is the “catch-all” place to ask all the questions you haven’t had the chance to get answered.<br>Commitment to Implement exercise.<br>Closing remarks. |

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