FastTrack
for Growth

TRAINING FOR NEW ADVISORS - LOS 0-5

TELECONFERENCE AGENDA

THE OECHSLI INSTITUTE

FastTrack for Growth

TRAINING FOR FINANCIAL PROFESSIONALS LOS 0-5

OVERVIEW

Master the activities of elite advisors. We can teach you how to walk the walk, talk the talk of the best Rainmakers. How? Because that's what we do. We develop veterans into Rainmakers. We develop rookies into Rainmakers. We know what the affluent want and we know what Rainmakers do. Why struggle with old-school training when you can accelerate your growth by participating in this program? There is a reason why most rookies fail - they are not taught how to properly market their practice. The choice is yours.

Our job is to make certain that you are doing the Right Activities, that you are performing these activities the Right Way, and that you are getting in front of the Right Prospects. We refer to this as your Critical Growth Path.

A common success thread is woven throughout all of the FastTrack for Growth sessions - Activity - linked to an obsessive goal focus. Every exercise, every skill you learn and practice, every aspect of the knowledge regarding the affluent you learn, and every discussion is very carefully crafted to not only keep you on your Critical Growth Path, but to accelerate your progress.

Join us for the following action-packed sessions:

- ☑ Mastering Your Target Market - The Affluent
- ☑ High Impact Marketing - Part 1
- ☑ Rainmaker Mindset for New Advisors
- ☑ High Impact Marketing - Part 2
- ☑ Tools of the Trade (Affluent Sales Skills Training)
- ☑ New Advisor Verbiage
- ☑ Branding 101 - Personal Financial Organizer
- ☑ Positioning Yourself as the “Go-to” Advisor

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Session 1: Mastering Your Target Market - The Affluent (9/9 at 4:15pm EDT)

- Introduction and Overview of the FastTrack for Growth program
- Explanation of the *Accountability, Feedback and Suppor*t process
- The 8 Criteria the Affluent use to select a Financial Advisor
- How the Affluent Make Major purchase decisions
    - Where do they look for options?
    - How do they make the final choice?
    - How do they determine to use the same provider again?
- Crafting your value proposition
- Creating your "Critical Path" to success

Session 2: High Impact Marketing - Part 1 (9/16 at 4:15pm EDT)

- Learn the differences between High-impact, Medium-impact and Low-impact activities
- Implementing the High-Impact Prospecting Methods (part 1)
    1. Arranging Introductions
    2. Generating Referrals
- Learn the difference between introductions and referrals – "Salespeople ask for referrals, Rainmakers arrange personal Introductions"
- Learn the power of word-of-mouth influence within affluent COIs
- Learn how to properly get introduced to affluent prospects without looking salesy
- Do's and Don'ts of asking for introductions
- Rainmaker Verbiage - Personal Introduction -and- Recovery Strategy

Session 3: Rainmaker Mindset for New Advisors (9/23 at 4:15pm EDT)

- How to develop the Mindset of a Rainmaker – fearless, goal focused and plays to win
- How to transform your goals into a mental compulsion using Synergistic Goal Setting
- The importance of consistently going outside your comfort zone
- The Rainmaker Achievement Cycle: *doing-thinking-feeling* linked to a specific Goal
- Developing your Achievement Cycle when engaged in Out-of-Comfort zone activities
- Mastering the *secret* – advisors doing FDAs when they'd rather be doing something else
- Each advisor will create their personal *Critical Growth Path*

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Session 4: High Impact Marketing - Part 2 (9/30 at 4:15pm EDT)

- Implementing the High-Impact Prospecting Methods (part 2)
    3. Strategic Networking
    4. Strategic Referral Alliances
    5. Intimate Client Events
- How to maximize your networking efforts to bring in more new business
- How to create effective CPA alliances using the Personal Financial Organizer
- How to hold Intimate Client Events – fun events that fill your pipeline with prospects
- How to become successful at social networking

Session 5: Tools of the Trade (Affluent Sales Skills Training) (10/7 at 4:15pm EDT)

- Learn how to develop strategic intent in everything you do
- How to avoid the typical advisor “talking too much” trap
- How top advisors ask questions and develop rapport
- How to activate your Rainmaker Antenna - uncover opportunities everywhere you go
- Master the art of mini-closing - consistently putting business in your pipeline
- How to make a positive and lasting first impression.

Session 6: New Advisor Verbiage (10/21 at 4:15pm EDT)

- Master the most commonly asked questions of a new advisor
    - “How old are you?”
    - “How long have you been in the business?”
    - “How solvent is your firm?”
    - “How do I know I’m not being Madoffed?”
    - “What are your fees?”
- Learn seamless and direct sales verbiage that’s been proven to work - time and again
    - How to offer second opinions on portfolios
    - Segueing social conversations into business opportunities
    - Jumpstarting CPA alliances
    - How to approach someone with $25MM, $50MM or even more

Session 7: Branding 101 - Personal Financial Organizer (10/28 at 4:15pm EDT)

- Affluent research highlights – the Affluent are looking for help with financial documents
- The "Big 3" – the top 3 criteria that represent the biggest gap between affluent expectations and FA performance. Learn how to close the performance gap
- The 7-Steps for incorporating a Financial Organizer into your practice
- How to use your Financial Organizer as a marketing tool, a sales tool, a re-positioning tool, an upgrade tool and a referral alliance generator

Session 8: Positioning Yourself as the "Go-to" Advisor (11/4 at 4:15pm EDT)

- How the affluent perceive the financial services industry
- Use the skepticism and distrust of the affluent for marketing your practice
- Capitalize on veteran advisor missteps
- Present yourself with understated confidence
- Making a positive and lasting first impression
- Sell without selling – learn sales skill so seamless they are practically invisible
- Learn how to become the "go to" financial advisor for your clients

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PROGRAM STARTS SEPTEMBER 9th!
SIGN UP NOW AND GET YOUR MATERIALS IN ADVANCE!
FAX THIS FORM TO 336.273.2342 or CALL 800.883.6582

FASTTRACK FOR GROWTH INCLUDES:

- INTENSIVE TWO-MONTH PROGRAM
- WEEKLY FASTTRACK TELECONFERENCE CALLS
- FASTTRACK FOR GROWTH IN A BOX ($395 VALUE)
- WEEKLY RAINMAKER QUICK TIPS
- SPECIAL ACCESS TO OUR ADVISOR FORUM

FASTRACK SESSIONS:

- [x] Mastering Your Target Market - The Affluent
- [x] High Impact Marketing - Part 1
- [x] Rainmaker Mindset for New Advisors
- [x] High Impact Marketing - Part 2
- [x] Tools of the Trade (Affluent Sales Skills Training)
- [x] New Advisor Verbiage
- [x] Branding 101 - Personal Financial Organizer
- [x] Positioning Yourself as the "Go-to" Advisor

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Sign up Form

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CC#:______________________________ Exp Date:________________________