



THE ASSET ACCELERATOR AGENDA

BILL GOOD
MARKETING

Day 1



8:00 – 9:00 AM

Welcome, Introductions, and Orientation

- The Vision
- Backing Into the Numbers

9:00 – 10:00 AM

The Advisor's Model Day

- The Value of the Advisor's Time
- Planning for Maximum Production

10:00 – 10:15 AM

Break

10:15 – 11:00 PM

Leveraging a Team and Technology

- The Org Chart
- When and How to Hire

11:00 – 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

12:00 – 1:00 PM

Lunch

1:00 – 2:45 PM

Prospecting Strategy Overview

- Recipe for Prospecting Success
- Maximize Referrals
- Four Relationship Marketing Strategies

2:45 – 3:00 PM

Break

3:00 – 4:00 PM

Prospecting Strategy (Continued)

- The Seven Mass-Prospecting Strategies



8:00 – 8:15 AM

Q&A

8:15 – 10:00 AM

Managing the Pipeline

- Lead Development Explained
 - Opportunity Tracking
 - Profiling Over the Phone (Script Writing)
-

10:00 – 10:15 AM

Break

10:15 – 11:15 AM

Staging the Office

- Location, Location, Location
 - The Welcome Sign
-

11:15 – 12:00 PM

Your Digital Footprint

- The Tenets of Be Found, Look Good
 - Five Ways Your Web Presence Prepares Your Prospect
-

12:00 – 1:00 PM

Lunch

1:00 – 2:00 PM

The Appointment Process

- Understanding the Meeting Cycles
 - Prepping the Prospect
 - Due Diligence Before Meeting
 - Creating an Agenda
 - Advisor Prep Day Of
-

2:00 – 2:15 PM

Break

2:15– 3:00 PM

Documents to Prep

- The Three-Step Credential Presentation
 - Creating Your “Brochure”
 - Your Expert Library
 - Your Mission Critical Questionnaire
-

3:00 – 4:00 PM

Your Value Statement

- What is Your Story
- Why You Should be Driven by Why and What, Not How



Day 3

BGM

8:00 – 8:15 AM

Q&A

8:15 - 9:00 AM

The Discovery Meeting

- Meeting Staging
 - Bridging to Questionnaire
 - Using Null, Person, and NOC Questions
 - The Art of Note Taking
-

9:00 – 9:30 AM

Demonstration of Discovery

9:30 – 10:30 AM

Role Play Discovery

10:30 – 10:45 AM

Break

10:45 – 11:00 AM

Good/Opportunities to Improve

11:00 – 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 – 1:30 PM

Demonstration of Discovery

1:30 – 2:30 PM

Role Play Discovery

2:30 – 2:45 PM

Break

2:45 – 4:00 PM

The Homework

- Assignment Reminders
- Analyzing the Data
- Prepare Your Implementation Steps
- Prepare Your Education Plan
- Writing an Effective Proposal



8:00 – 9:45 AM

Managing the Pipeline

- Start with Education
- Presenting the Written Proposal
- How You Solve Pain

9:45 – 10:00 AM

Break

10:00 – 11:00 AM

Handling Objections

- Question Answering
- “Let Me Think About It” Script
- Interviewing Other Advisors Script
- Costs Script

11:00 – 12:00 PM

Implementation Schedule

- What To Do Monday
- Six Month Implementation

