



2023-2024 Tentative Schedule of Coaching Topics

Month	Topic	<u>What We'll Discuss..</u>
Month 1	"Branding Brilliance: Carve Your Niche"	How are you differentiating yourself from the 350,000+ other financial advisors? Learn practical steps to create a recognizable and trusted personal brand. <ul style="list-style-type: none"> • Understand the principles of personal branding. • Learn how to differentiate yourself in the market. • Develop a personal branding strategy. • Develop a growth plan for your practice.
Month 2	"Speak Their Language: Crafting Compelling Messages"	Ready to captivate your ideal client by creating powerful compelling marketing messages that align with your brand? <ul style="list-style-type: none"> • Learn the elements of a powerful marketing message. • Understand how to align messages with client needs. • Develop skills to adapt messages for different platforms.
Month 3	"Loud and Clear: Maximizing Your Message Reach"	After you craft a compelling message, where do you put it? <ul style="list-style-type: none"> • Understand the importance of multi-platform content distribution. • Learn how to choose the right platforms for your message. • Develop a content distribution strategy.
Month 4	"Attract to Impact: Lead Generation Mastery"	You've got a great brand and great messaging, but how do you get them to take the bait? Let's discuss proven tactics and strategies for attracting and managing ideal leads. <ul style="list-style-type: none"> • Understand the principles of effective lead generation. • Learn how to qualify and manage leads. • Develop a personalized strategy for consistent lead generation.
Month 5	"Know Your Worth: Specializing for Success"	Have you ever had an issue with defining your value and charging what you are worth? Let's discuss the benefits of specialized knowledge and how to acquire it. <ul style="list-style-type: none"> • Understand the benefits of specialized knowledge. • Learn how to identify your areas of specialty. • Develop strategies for continuous learning and development.
Month 6	"The Art of Pricing: Capturing Your True Value"	Part of the value equation is something that is worth what you want to charge. Now you need to learn the difference between price and value as we Unpack the science and art of pricing services to reflect true value. <ul style="list-style-type: none"> • Learn the factors that influence pricing. • Understand how to align pricing with value delivered. • Develop a pricing strategy that communicates your value.
Month 7	"Sell without Selling: Consultative Selling Techniques"	Learn how to 'sell' your services without making your prospects feel like they're being sold to. <ul style="list-style-type: none"> • Understand the principles of consultative selling. • Learn techniques to effectively communicate value

		<p>without hard selling.</p> <ul style="list-style-type: none"> • Develop a personal consultative selling approach.
Month 8	"Road to Riches: Revenue Goal Mastery"	<p>Now that you know how to “sell” your services, you can reach your revenue goals, right? Maybe...</p> <ul style="list-style-type: none"> • Understand the principles of revenue planning. • Learn how to set and track revenue goals. • Develop a personalized revenue growth strategy.
Month 9	"Balance is Profit: Achieving Work-Life Harmony"	<p>More money means you should be able to start buying back your time for the things that matter to you. Let's discuss how achieving revenue goals can help regain control of time and life balance.</p> <ul style="list-style-type: none"> • Understand the relationship between work-life balance and profitability. • Learn strategies for effective time management. • Develop a personal strategy for work-life balance.
Month 10	"Work Smart: Automating Your Practice"	<p>Got more business than you can handle? Perhaps you'd benefit from automation...</p> <ul style="list-style-type: none"> • Understand the principles of work automation. • Learn about tools and practices for efficient work. • Develop a personal work automation strategy.
Month 11	"Client for Life: The Secret to Lasting Bonds"	<p>To have a thriving practice you need loyal clients. Let's discuss strategies to enhance client relationships and retention.</p> <ul style="list-style-type: none"> • Understand the key elements of strong client relationships. • Learn strategies for client retention. • Develop skills to manage difficult client situations.
Month 12	"Blueprint to Success: Building Your Ideal Practice"	<p>What are the steps to building your ideal practice? Is it even achievable?</p> <ul style="list-style-type: none"> • Understand what an "ideal practice" means. • Learn about the key components of an ideal practice • Develop a roadmap to build your ideal practice.