



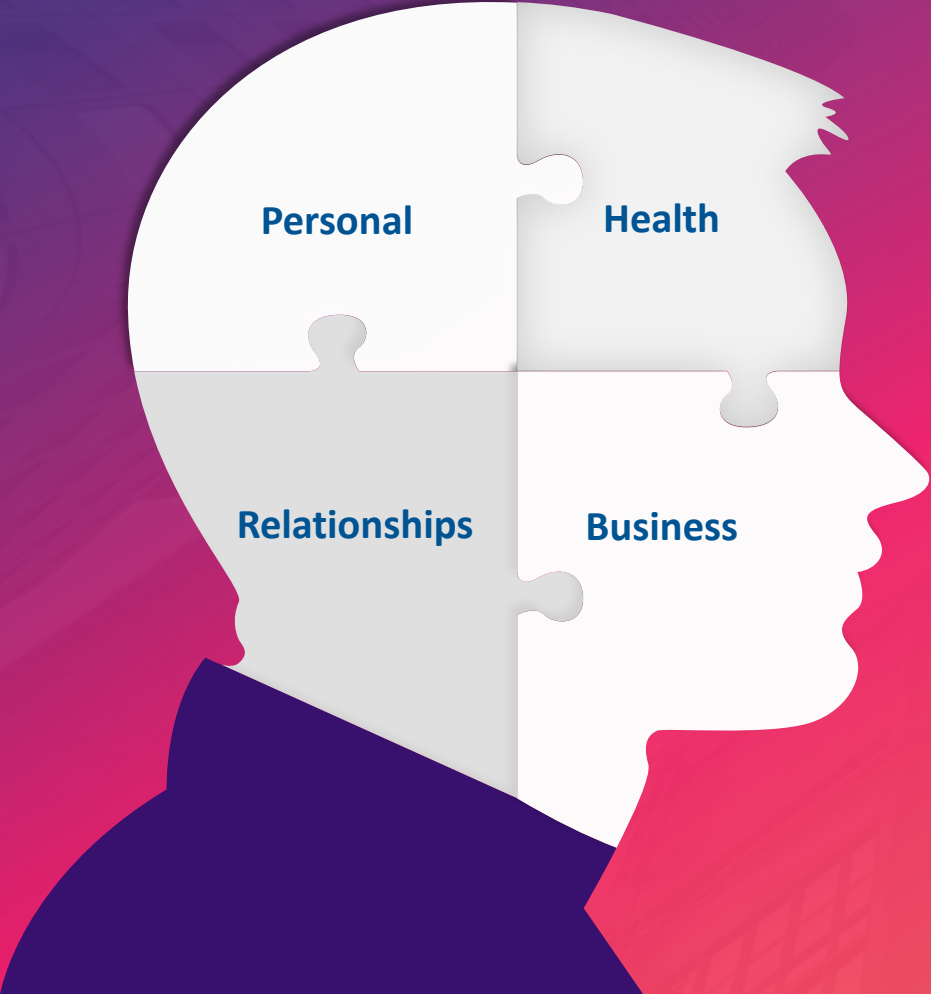
Platinum Coaching Alliance

How to fill your Pipeline &

How to Maximize Business Opportunities



Clearing Exercise



Personal

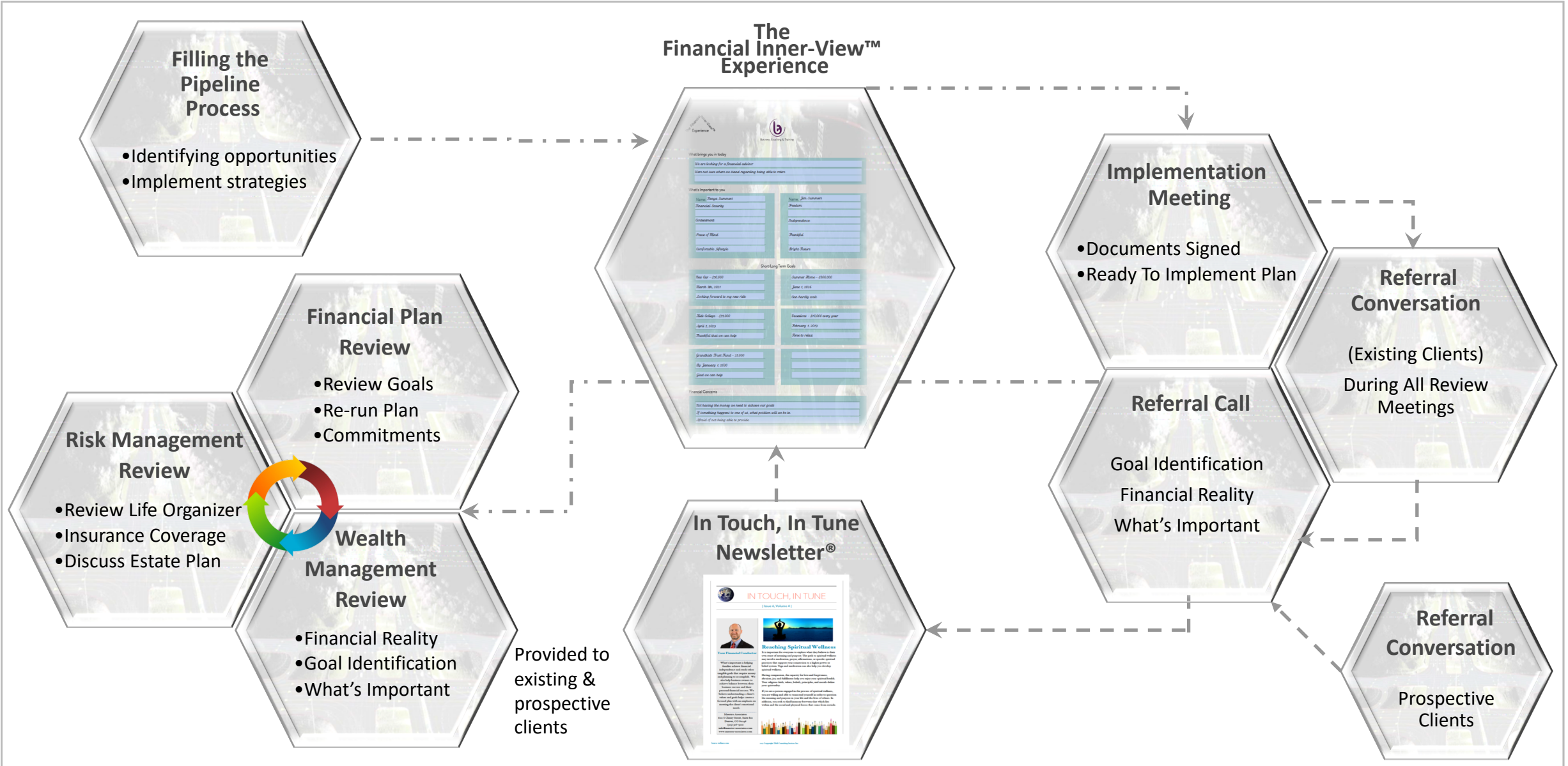
Health

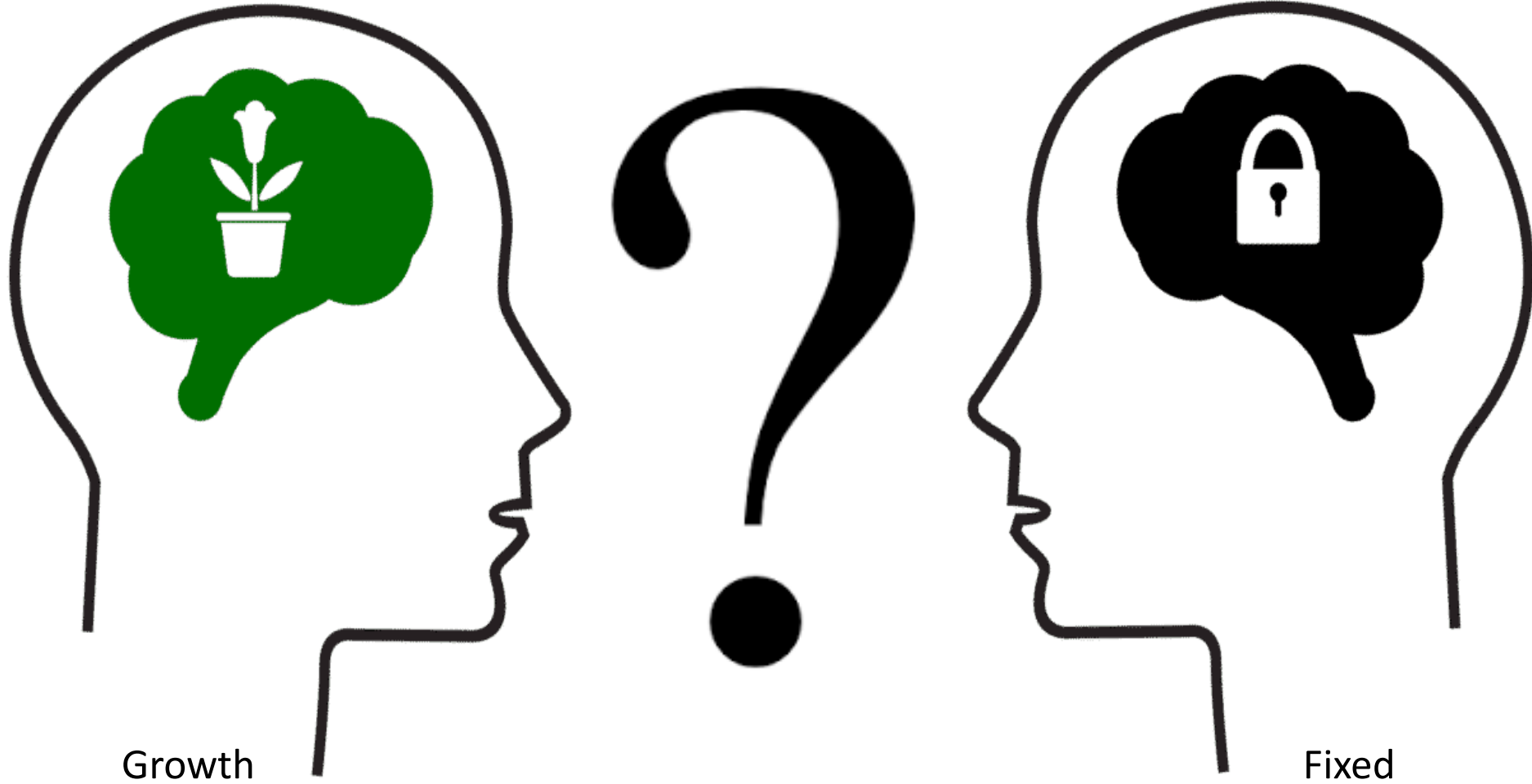
Business

Relationships



Turn Key Success Model





Growth

Fixed



EXPECTATIONS

My Expectations

- ↳ Clarity
- ↳ Value
- ↳ Believe

Your Expectations?



Difference

Time

Knowing

WHY?

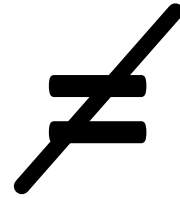
Legacy

Impact

Support



Activity



Results



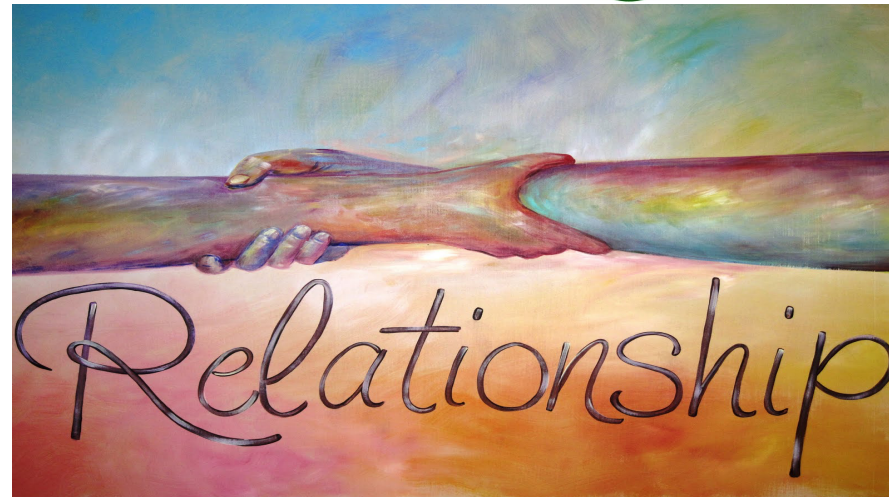
Types of clients













THEY JUST
DON'T
GET IT





Communication

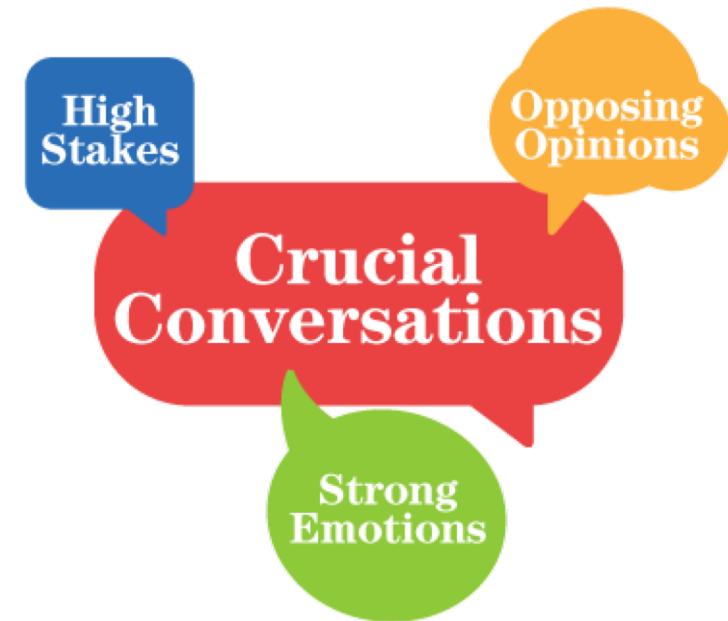




- Ⓟ Family
 - Ⓟ Spouse/Partner
 - Ⓟ Siblings
 - Ⓟ Kids
- Ⓟ Friends
- Ⓟ Clients
- Ⓟ Prospective clients
- Ⓟ Referral Partners
- Ⓟ Team members



- Ⓟ What do you do?
- Ⓟ How do deliver on what you promise to clients
- Ⓟ How do you charge?
- Ⓟ What do your clients get for what they pay you?
- Ⓟ Why should I work with you rather than other advisors?
- Ⓟ How do I know I can trust you and your company?
- Ⓟ What kind of clients do currently serve?
- Ⓟ What makes you think I would be a good fit?
- Ⓟ What keeps you in this business?
- Ⓟ What's your process if I become a client?





- Ⓟ Purpose?
- Ⓟ What is malpractice?
- Ⓟ Tone
- Ⓟ Exploring
- Ⓟ Topics
- Ⓟ Open vs. closed
- Ⓟ Plan
- Ⓟ Clarifying, Expanding, Impact
- Ⓟ Let go
- Ⓟ Next Call
- Ⓟ Value
- Ⓟ Process





People Hire Me Because

People hire me as their advisor because...



Attracting clients to your business is Your responsibility.



People introduce others to me because...



Attracting clients to your business is Your responsibility.



People Hire Me Because

- ⑥ Trust, history, competence, truth telling, processes, passion, focus, charisma
- ⑥ Make it all about them, easy for them to understand, confidence, clarity
- ⑥ Get things done, taking over
- ⑥ Caring, listening, passion, enact change
- ⑥ History, relationship, loyalty, approach, expectations
- ⑥ Referred, trust confidence in achieving goals
- ⑥ Peace of mind, keep them from making mistakes, understanding they cannot get anywhere else
- ⑥ Organize and coordinate financial house, achieve goals, confidence about goals

YOU'RE HIRED



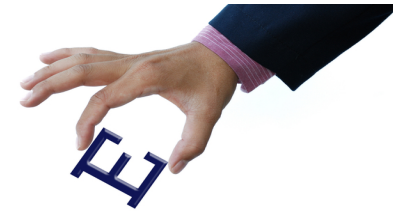
Introduce Me Because

- Experience same as other in goals, clarity in financial house
- Benefited from services, understand unique value proposition
- Make a difference in lives, impact
- Experience something that is different, confidence
- Faith & trust and help those they care about
- Connection, relationship, able to help others with needs, take care of them, part of the community
- Value relationships, children benefit, comfortable, understanding, (I ask them)
- Trust, confidence, experience





People hire me because...



EFFECTIVE
EFFECTIVE

People introduce others to me because...

**EARN
THE RIGHT
TO ASK**

Attracting clients to your business is Everyone's responsibility.



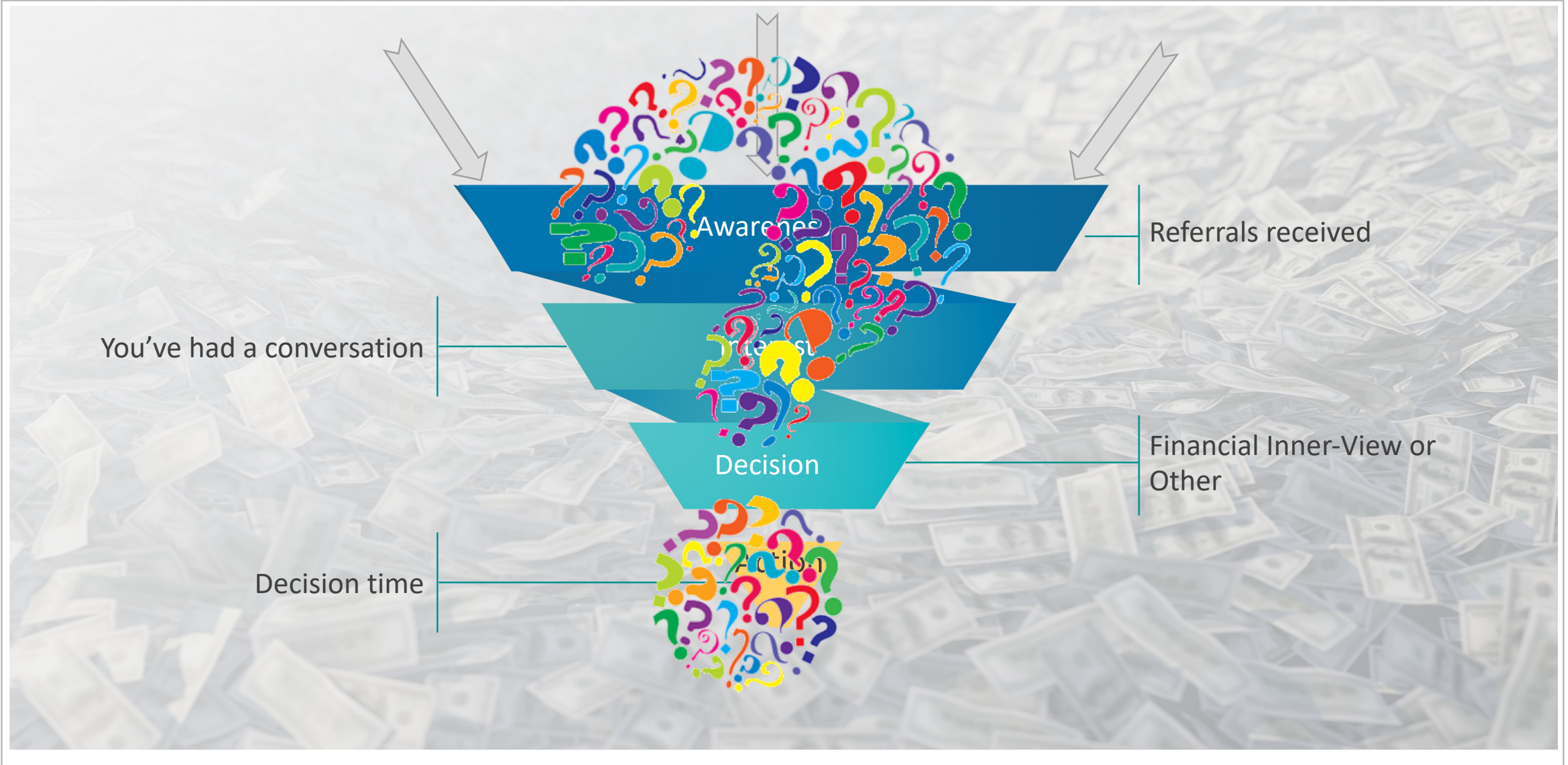
Referral Process & “Pipeline”



- Ⓟ Difference?
- Ⓟ Is it important?
- Ⓟ Why?
- Ⓟ Taking it for granted.
- Ⓟ Personal/Business



Opportunity Funnel





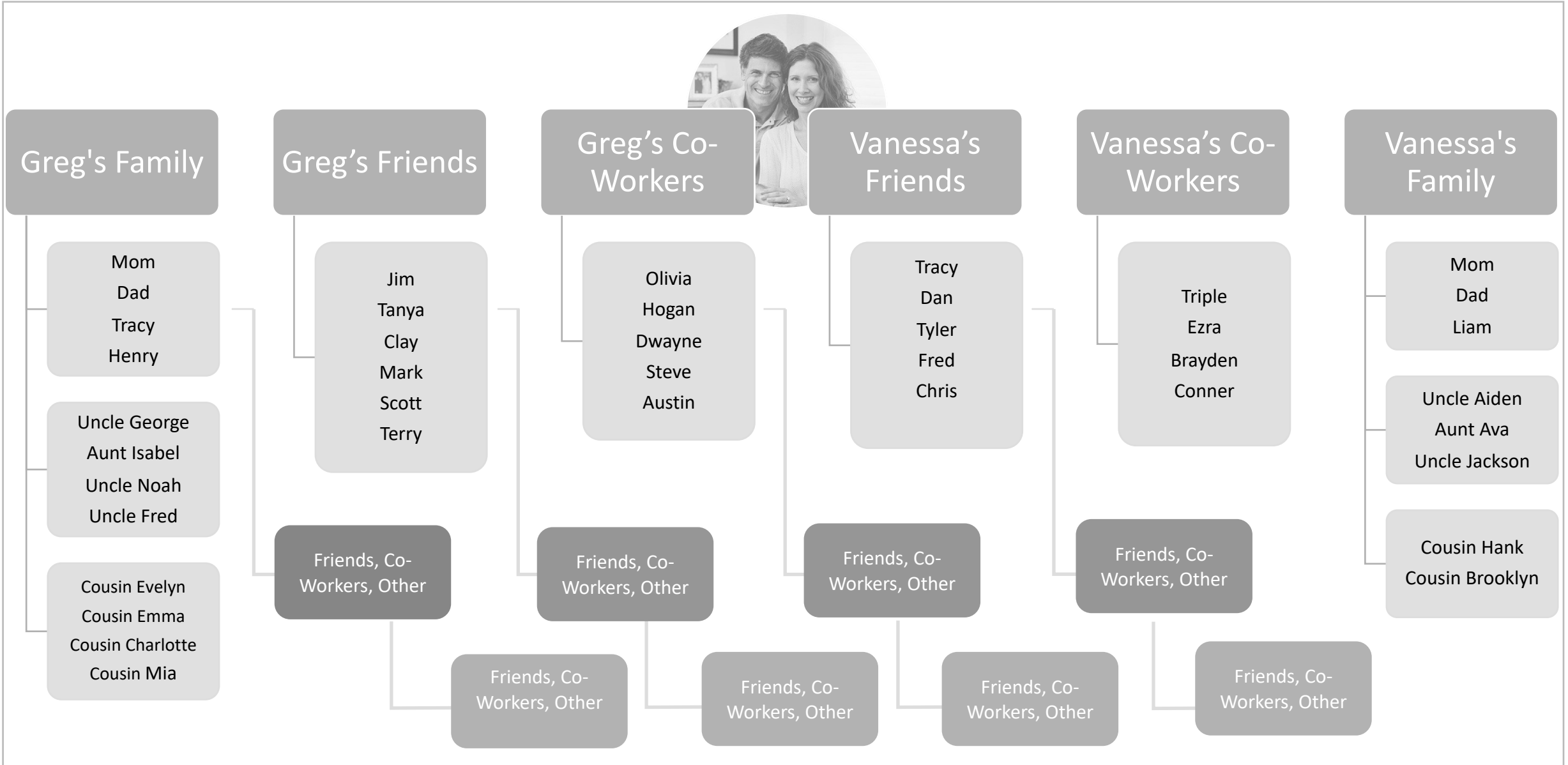
Harder Way







Referral Pipeline





Progress Meeting Agenda

- ④ Goal progress
- ④ Financial plan review
- ④ Annual review
- ④ Insurance review
- ④ Planning review
- ④ Referral conversation

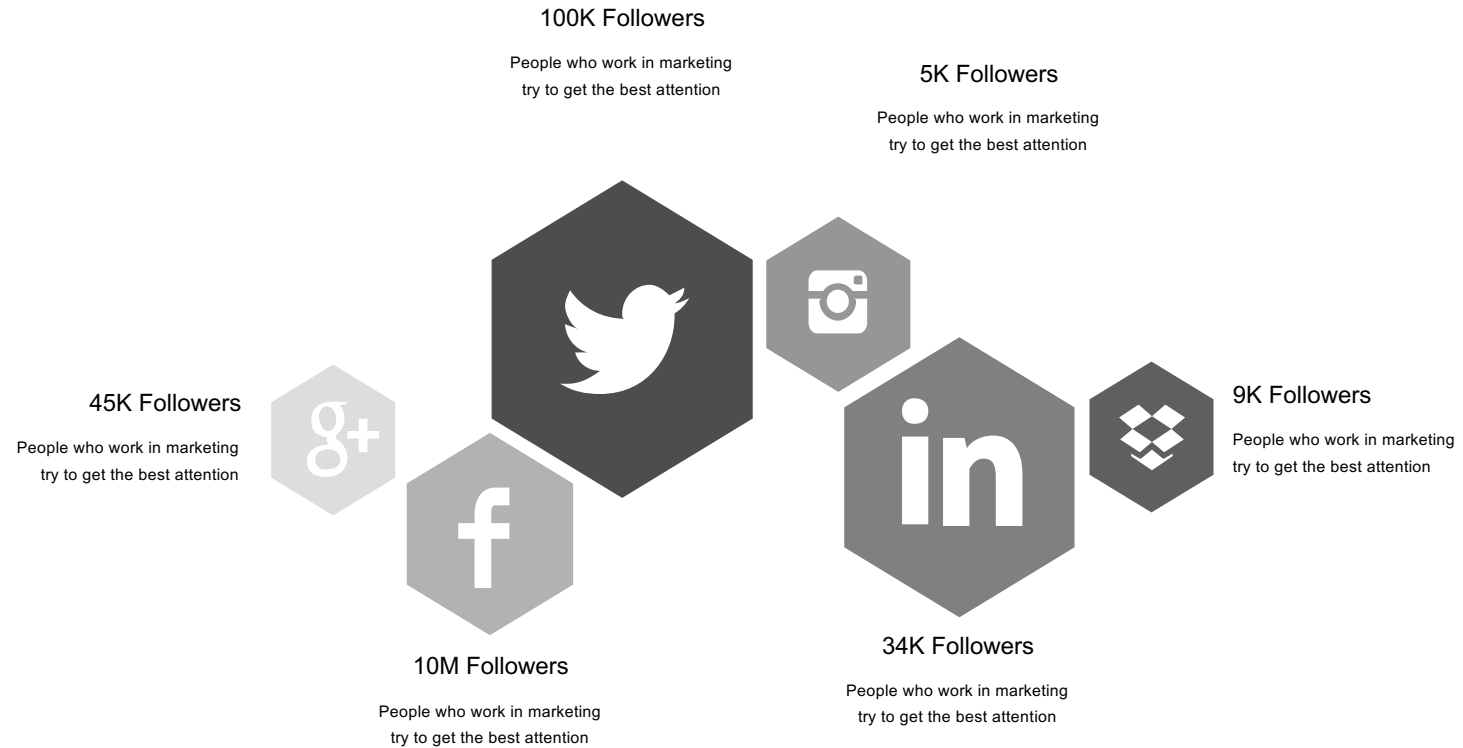


Strong end to a progress meeting





SOCIAL MEDIA





S . ingle

S . imple

D . oable

T . hing



Call To Action



Schedule a review:

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