



## Maximizing Automatic Sales Success *Achieving Critical M.A.S.S. That Accelerates Perpetual Growth*

### **Purpose**

The Purpose of the program is to provide high value material in the most critical 17 competencies found among top producers. Our goal is to deliver the necessary learning & development support which leads to automatic execution of these best practices, in an easy-to-implement way that will guarantee growth in the originators business.

The Live Online sessions will be highly interactive Group Coaching workshops. Participants will leave the webinar with tools they can immediately use to grow their business 3 to 4 times faster than industry norms, and achieve 30-50% growth within 4-6 months of attending the workshop series.

Below are the main learning objectives highlighted in italics at the beginning of each modules outline.

In over 3,000 individual client semesters spanning 7+ yrs and the broadest possible cross section of the industry we have recognized not only what the best practices of top producers include, but have also mastered the techniques which create the fastest possible growth for your front line sales people.

Our unique process creates a massive cycle of growth combining:

- 1. *Winning status and strategy assessment,***
- 2. *Active and aggressive cycles of planning,***
- 3. *Solutions oriented, accelerated performance execution***

Consider the life cycle of a nuclear reaction. Few can doubt that a nuclear reaction is the most powerful source of energy currently known to man; but how does it get started? In the beginning it takes a huge amount of energy to split atoms and trigger the start of the reaction, but once critical MASS is reached, the reaction itself takes over, and produces more than enough energy to continue and even accelerate the size of the reaction and the amount of energy produced.

Simply put if you want a system that teaches your originators how to start over every month, and do a bunch of expensive marketing that yields a number of low profit transactions, then we are not your solution. However, if you want your team to internalize and use techniques on a daily basis that create self accelerating, perpetual and sustained growth, then this is your program!

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**Module 1**

**Building Your Best Year Ever, Keys to Accelerating Performance**

**Points Covered In This Section**

1. Applying unlimited possibility planning to the real world.
2. Creating momentum for perpetual growth (critical MASS achievement)
3. Fundamentals of success
4. How to quickly find the Opportunities/ needs currently in your market
5. Identifying what you are committed to achieving, what drives you.
6. Setting & tracking daily disciplines to guarantee your production targets are hit.
7. Strategic goal setting and opportunity focus
  - a. Daily disciplines
  - b. Obstacles or opportunities? (yellow Honda analogy)
  - c. positive focus = progress not perfection
  - d. Volume goals
  - e. What are your greatest opportunities for growth? (SWOT exercise)
  - f. What can we control? What can't we control? (Breathing analogy)
8. Success acceleration through tracking
  - a. The dashboard effect- (use the Mercedes commercial)
  - b. Time tracking
  - c. What gets measured Gets done (The Hawthorne Effect)
9. The power of Opportunity vs. Obstacle based thinking
10. The things we can change to create progress.
11. What are the possibilities? (Sears effect)
12. What is your Purpose, dream circle, and vision
13. Where can you gain insight? (Masterminding & mentoring) (maze analogy)
14. Where to find "best Practices" and "key solutions"

Module 2

**Mastering Client Value Presentation and Influence**

**Points Covered In This Section**

1. Building a brand = Consistent client experience every time at all levels.
2. Building a Killer Consultation program
3. High Speed Information gathering and brand collateral
4. How to quickly & clearly separate yourself every time
5. Identifying Key client needs and consultative VS assumptive selling
6. Intake systems and unique value propositions
  - a. Consistent communication = consistent results
  - b. Break down Strategy
  - c. Positioning script
  - d. Consultative selling strategies = pin point accuracy
7. Repeat & referral business mastery - Annuitizing your business
8. Selling the pen exercise
  - a. Assumptions, expectations and next steps
  - b. Conversion and preempting objections,
  - c. Educate to Elevate
  - d. Killer consultations / presentations
  - e. Law of diminishing returns- the Archie Bunker Uncle advisor
  - f. Long-term client care, the power of reviews
  - g. Maximizing influence, and expanding your reach, who do they know, that needs your help?
  - h. Needs assessment reviews, client engagement strategies
    - i. Eating an artichoke, peeling through the layers to get to the heart of the matter.
    - ii. Leverage for maximum efficiency – questionnaire
  - i. Scheduled consultation appointment
  - j. Options & opinions- either/or choices
9. Selling to what's in it for them
10. Simple tool to yield 5-7 referrals from every consult
11. What is value?
  - a. How do you communicate value
  - b. Increased value = increased profits
  - c. Who needs you/ web of opportunity
12. Who questions to generate massive referrals
13. Why should they work with you? What is your Value Proposition?

**Module 3**

**Marketing /Visibility**  
**To Double Your Volume/ Double Your Leads**

**Points Covered In This Section**

1. Client conversion- what is your process? When to call
2. Client follow through- 33 touch
3. Client warm up- build your brand build your value 8x8
4. Consumer direct marketing science theory and practice
5. Defining marketing targets
6. Direct mail success- What is your target?
  - a. EDR marketing
  - b. Find a need/ find a lead, who needs you?
7. Fundamentals of effective marketing
8. Leverage your database,
9. Marketing your value proposition, maximizing customer value
  - a. Maximizing the referrals, who Vs. Do
10. Mega marketing- Leveraging technology, media, tradeshow and local networks for maximum reach
11. Repeat & referral business mastery - Annuitizing your business
12. Selling to what's in it for them
13. Simple tool to yield 5-7 referrals from every consult
14. Why should they work with you? What is your Value Proposition?
  - a. New-age marketing= internet, media, trade shows and educational workshops
  - b. Pillars of marketing
  - c. Reviews for repeat opportunities
  - d. Who do they know that could also help?
  - e. WIIFM and key benefits

**Module 4**

**Quadruple Your Volume in 90 Days**  
**The Power of Partnerships Leveraging: Values Based Synergy**

**Points Covered In This Section**

1. Automating your process and effectively dripping value
2. Becoming the number 1 brand
3. Building a brand = Consistent client experience every time at all levels.
4. Building a Killer Consultation program
5. Casting a bigger net through team marketing
6. Client introduction/ reconnection
7. Customer driven marketing, activating an army of clients marketing you.
8. Database integration techniques – how to triple your reach almost overnight
9. Defining your marketing strategy- What are your pillars and where is your focus
10. Edification, the bow flex guy ...
11. Finding massive pools of opportunity for your Value- Who needs you?
12. Finding massive trust in minimal time – POWER interview techniques
13. How to quickly & clearly separate yourself every time
14. Identifying Key client needs and consultative VS assumptive selling
15. Keys to influence and effective marketing- 6 laws of ethical influence
16. The 6 key conversations to maximize the partnership:
17. The capture every lead (sign call)/ positioning script conversation
18. The get your opinion, CAMP review / intro offer process to integrate databases
19. The How do you like to be referred conversation/ power of edification conversation
20. The question 22 conversation (digging out referrals)
21. The value of your time (get everybody prequalified) conversation
22. Who questions to triple production conversation

**Module 5**

**Building Bigger Faster: Keys To Higher Efficiency & Higher Volume**

**Points Covered In This Section**

1. **Disc Assessment to type personality**
2. **Effective automation strategies**
3. **Finding the right people the right way- strategies to hire right**
4. **Hiring unique ability and talent specific to the role creating exceptional performance**
5. **Keys to operational efficiency- systemized process (perfect loan process exercise)**
  1. **Learning style matching**
  2. **Managing a self guided learning process**
    - b. **Organize to energize**
6. **Prioritize by values, (protect time for Highest value activities)**
  1. **Breakdown strategy**
  2. **Demo- Do-Debrief**
7. **Setting it up & getting it started**
8. **Strategic process and exercise to get your system & team running at peak efficiency**
9. **Systems for maximum production in minimal time- keys to efficient task management**
10. **The value of a unique ability team- Roles & responsibilities**
11. **Time compression through outsourcing and virtual tools**
12. **Time management strategies- David Allen Style**
13. **Tools to maximize efficiency - error proofing and automating your process**
14. **Tools to maximize efficiency - error proofing and automating your process**
15. **Training Strategies for accelerated growth**
16. **What is your time worth? (Time tracker study)**

**Module 6**

**So You're More Successful than You Dreamed Possible, Now What?**  
**The Next Stage: Creating Leverage and Balance through Team Building, Recruiting and Hiring Right**

**Points Covered In This Section**

1. **Bonus commission and compensation structures**
2. **Company culture and long-term loyalty**
  1. **Big goals big rewards and big returns**
  2. **The value of the unexpected**
  3. **Work hard together and also play hard together**
3. **Designing job description by job function- what personality traits are ideal to the position**
4. **How to get your team motivated by the same things you are- incentive based compensation for all team members**
5. **How to stop the fluff when interviewing – behavioral based questioning**
6. **Making your team love you- keys to creating team synergy and camaraderie**
7. **Recruiting and hiring right with the star method.**
8. **Speaking their language – keys to getting team buy-in based on their unique personality**
9. **Training without losing your pipeline, keys to setting up self guided training programs**
10. **Training your team right, keys to accelerated learning**
  1. **Creating effective self guided training- resources outlined and regular review**
  2. **Do while you train (demo do debrief process)**
  3. **Learn faster through their best learning style**
11. **Personality based motivators**
12. **What do you want?**
13. **Who do you need?**