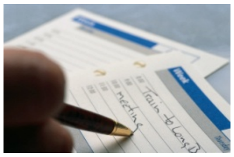

# The SuccessQuest™ Group Coaching Program Schedule

**Course Hours:**

⇨ 18 hours of teleclasses - 12 bi-weekly, 90 minute calls.

⇨ 6 hours of peer accountability buddy calls - 12 bi-weekly, 30 minute calls.

Prior to the first call, you will complete the MindScan Profile, the Coaching Profile, and a draft of your One-Page Business Plan.

**I. One-On-One Introduction Call with Coach/Facilitator:**

- a. Review Coaching Profile Questionnaire
- b. Review MindScan Profile
- c. Review Business Plan
- d. Review Expectations and Objectives
- e. Tour SuccessQuest Website ( test ids and passwords)
- f. Assign Accountability Buddy

**II. SuQu Getting Group Orientation Call:**

- a. Introductions
- b. MindScan Overview
- c. The SuccessQuest (SuQu) Program
    - i. SuQu Business Planning Process Overview
    - ii. Getting Started - Self-Assessment
        1. Clarity and Focus
        2. Sweet Spot Analysis
        3. Business Assessment
        4. SWOT Analysis
- d. Introduction to Opportunity Workbook
- e. Hot Topic

## III. Business Planning & The SuccessQuest Mapping Program – Part 1

a. Activity And Accountability Buddy Reports
b. Mission, Vision, and Key Performance Indicators
    i. The Mission
        1. What is a Mission?
        2. How will having a clear Mission serve me?
    ii. The Vision
        1. What is a Vision?
        2. What did I take away from The Vision?
        3. How will The Vision serve me?
    iii. Key Performance Indicators (KPI's)
        1. What is a KPI?
        2. What did I take away from having KPI's in place?
        3. How will having clear KPI's serve me?
    iv. Hot Topic

## IV. Business Planning & The SuccessQuest Mapping Program – Part 2

a. Activity And Accountability Buddy Reports
b. Reviews SuQu Mapping Progress
c. Strategies and Projects
    i. Strategies
        1. What is a Strategy?
        2. How will having clear strategies serve me?
    ii. Projects
        1. What is a project?
        2. How will having projects in place serve me?
d. Review The Opportunity Workbook
    i. Opportunity Workbook - Segmentation
    ii. Tracking Prospects, Cross-Selling, Centers of Influence, and Sales Opportunities
e. What are your clients concerned about today?
f. What are your concerns today?
g. Hot Topics

## V. Business Planning & The SuccessQuest Mapping Program – Part 3

a. Activity And Accountability Buddy Reports
b. Reviews SuQu Mapping Progress
c. Review List of Concerns Assignment
d. Daily Activities
    i. **Target Goals and Activity**
    ii. **The Perfect Week**
    iii. **The Production Sales Funnel**
    iv. Revenue Producing Activities (RPAs)
e. Mission, Vision, and Relationship Management
    i. What do you clients expect from you?
    ii. What are you providing to address these expectations?
    iii. The **Client Advisor Agreement**
f. Hot Topic

## VI. One-On-One Call - MindScan Review and Business Planning

a. Activity And Accountability Buddy Reports
b. Review **SuQu Map™**
c. Review MindScan Profile
    i. Strengths
    ii. Potential Weaknesses
    iii. Worlds
    iv. Clarity
    v. Bias
    vi. Dimensions
        1. Relater
        2. Doer
        3. Thinking
d. Discuss support team, team MindScan, and practice changes
e. Hot Topic

VII. **The Ideal Financial Advisor**

a. Activity And Accountability Buddy Reports
b. Describe the Ideal Advisor – Role Awareness
c. Complete the Characteristics of a Prime Performer
d. The Opportunity Workbook and Client Relationship Analysis
e. Hot Topic

VIII. **The Sales Process – Part 1**

a. Activity And Accountability Buddy Reports
b. Introduction to Wealth Management
    i. The Wealth Management Blueprint.
    i. The FireProof FileBox and Checklist
    ii. The Monthly Wealth Management Seminar
c. Hot topic

IX. **The Sales Process – Part 2**

a. Activity And Accountability Buddy Reports
b. Review FileBox Activity and Opportunity Spreadsheet
c. New Client Process – First Meeting, Welcome Kits and Tracking
    i. Networking and Referral Prospecting Systems
    ii. Client Events and Advisory Boards
    iii. Marketing Materials Website and Welcome Kits
        1. Client Advisor Agreement
        2. Brochures and Form Letters
        3. The Discovery Meeting and the Discovery Agreement Letter
        4. Client Management and Client Relationship Management Programs (CRM)
d. Hot Topic

X. **The Sales Process – Part 3**

a. Activity And Accountability Buddy Reports
b. Review Assignments Brochures and Forms
c. Case Preparation Checklist
    i. Planning Software
    ii. Advisor Resources
        1. Wholesaler Segmentation
c. The Presentation & Close
    - The presentation
        1. Will the solution work?
        2. Is it the best available?
        3. Will it be the best in the future?

- Closing Ideas

d. Best Take-away from program to date
e. Hot Topic

**XI. Your Sales Support Team**

a. Activity And Accountability Buddy Reports
b. Job Descriptions and Team Building
c. Employee Manuals
d. Team Meetings
e. Team Growth and Development
   i. Assistant Training
   ii. Paraplanner Designation
   iii. Personal Development (CFP, ChFC CFS, CFA, CIMA)
f. Hot Topic

**XII. One-On-One Call – Review MindScan, Five-Year Plan and Next Steps**

a. Activity And Accountability Buddy Reports
b. Retake MindScan
c. What should your business look like in five years?
   i. What should you be doing for your clients?
   ii. Number of Active Clients?
   iii. Number of Staff People and Duties?
d. Next Steps
e. Coaching and Program debrief

**Group Coaching Session Format:** 12 bi-weekly sessions of 90 minutes each. Each class will consist of:

**I. Review Business Activity; Previous Assignments and Material (15 minutes).**

- A. Are you on the call? (1 point)
- B. Did you have a call with your accountability partner? (1 point)
- C. Did you complete at least 2 of your assignments? (1 point)
- D. Play full out on today's call! (Contribute at least 2x/call = 1 point)
- E. New actions since last call? (1 point)
- F. Best success story since last call? (1 point)

**II. The SuccessQuest™ Group Coaching Program Content & *Context* Discussion - (20 minutes)**

**III. SuQu™ Application *Content & Context* Discussion - (20 minutes)**

**IV. HOT TOPICS Group Clarity Session (15 minutes)**

- A. Participants submit HOT TOPICS up to 48 hours before the session.
- B. Coach/Facilitator reviews accountability from person in Hot Seat from previous session with participants.
- C. Coach/facilitator selects participant with HOT TOPIC for this session.
  1. Participant Describes the HOT TOPIC.
  2. Participant Clarifies the HOT TOPIC by answering questions.
  3. Participant Listens to Feedback from the participants, as another participant takes Feedback Notes.
  4. Participant commits to Accountability Steps prior to the next session.
- D. Coach/Facilitator solicits other HOT TOPICS for Rapid Fire Response from the Participants.
- E. Coach/Facilitator encourages Peer Group Calls as needed and by topics.

**V. Session Wrap Up, Takeaways & Assignments (remaining time - 10 minutes)**

Note: The Coach/Facilitator will award an additional 1-4 points based on your participation level during each call.

## Best Practices for All Sessions & Additional Comments:

Each session will focus on Accountability, Positive Action, Results and Peer Alliances.

- Complete all Accountabilities prior to each session.
- Call in individually from your office or any place where you have computer access. A webinar format will be used for most calls; cell phones and call-in locations that lack an internet connection are discouraged. Your team members may listen in on each call.
- Play FULL OUT. Be fully present on the calls – no multi-tasking.
- Total confidentiality.
- Leaders/Attendees will receive a syllabus and class outline before each class with a detailed schedule, pre-work reminder, etc.
- Participants may become individual coaching clients at any time.
- Guest facilitators & subject matter experts will periodically join sessions to reinforce content throughout the program.
- Other assessments, such as DISC, Time Mastery Profile, Emotional Intelligence, or the Practice Assessment tool will not be a part of the group coaching content, but may be part of individual coaching calls or purchased separately.
- Each participant will have at least one accountability buddy for discussion/ resource/ to share SuQu online accountability content.

The point system will reinforce accountability.