

Communications Training with the 4S Framework™

A messaging workshop offered through Dimensional 360®

This workshop offers techniques and tools to help you elevate your conversations with clients and prospects. Using our 4S Framework, you can combine scripts, stories, sketches, and supplements to customize your communication.

Details

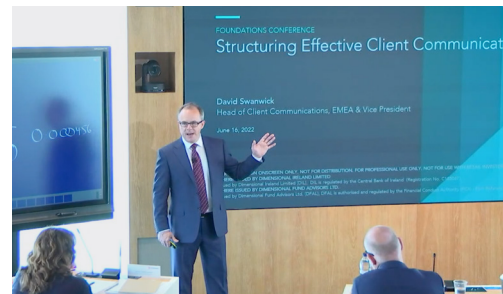
Workshops are typically held in the participating advisory firm's office, a third-party event space, or a Dimensional facility. An event lasts 1–3 hours, depending on depth of training. The sessions blend structured presentation materials with interactive topic modules to foster collaboration and creativity.

Topic Options

During a session, the speaker will address sample topics arising in client meetings, such as:

- The Value of Advice
- Stock Market Conditions
- Global Diversification
- Managing the “Crisis of the Day”
- What about Inflation?
- Recessions and Markets
- Sustainability Investing

This material should be regarded as educational and nothing discussed or suggested should be construed as permission to supersede or circumvent any of your firm's policies, procedures, rules, and guidelines. For Financial Professional Use Only — Not for Use with the Public.



Benefits

- Strengthen your communication skills and deepen client relationships.
- Use storytelling and other techniques to educate and inspire.
- Lead more effective conversations and improve your client experience.

Objectives

- Enhance consistency of communication across your firm.
- Apply the 4S Framework to any topic of client interest.

Recommended Participants

- Advisors who want to improve their responses to client questions and concerns
- Leaders and advisory/support staff involved in client communication
- Marketing and business development professionals



Workshop Sample Agendas

4-Hour Sample Workshop

8:00–8:30 am	Breakfast
8:30–10:00 am	Introduce 4S Framework and conduct interactive session for Topic 1: Why this approach to investing?
8:30–9:00 am	Introduction and Topic 1 Setup
9:00–9:05 am	Individual Reflection
9:05–9:20 am	Small Group Breakout
9:20–9:40 am	Large Group Discussion
9:40–10:00 am	Role-Play
10:00–11:00 am	Topic 2: What is the value of an advisor?
11:00–11:05 am	Break
11:05 am–12:00 pm	Topic 3: What do we do about the “crisis of the day”?

2.5-Hour Sample Workshop

8:30–10:00 am	Introduce 4S Framework and conduct interactive session for Topic 1: Why this approach to investing?
10:00–11:00 am	Topic 2: What is the value of an advisor?

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