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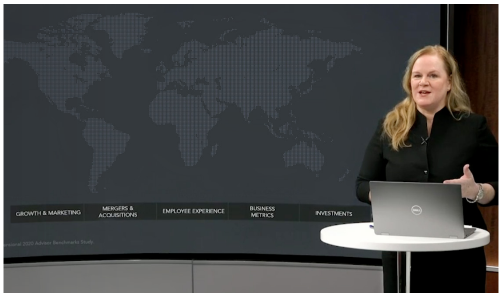
Advisor Growth Workshop

Business Strategy Training Offered through Dimensional 360®

This interactive event combines research data, strategic planning, and practical exercises to help advisors create a plan for business growth.



Details

The full workshop lasts 4–6 hours and can be held as a single session or in multiple sessions, depending on size and scope. We can tailor a workshop for a small advisor group or conduct a firm-wide event that includes leaders. (We recommend a minimum of five participants.) Training is also offered through one-on-one discussions. The event may require prework by participants.

Benefits

- Explore strategies, personal goals, and key metrics around business growth.
- Create a plan for generating prospects through referrals from current clients and centers of influence (COI).

Objectives

- Learn how to identify an ideal target client profile.
- Develop an understanding of the Cornerstones of Advice framework, and determine how to exhibit value to prospective clients.

Participants

- Growth-minded wealth advisors and firm leaders
- Firms that want to encourage client referrals
- Business development and client support staff

Workshop Sample Agenda

6–Hour Sample Workshop

9:00–9:25 am	Introduction
9:25–10:00 am	**Insights on Growth**
10:00–10:15 am	*Break*
10:15–10:50 am	**Core Why**
10:50–11:30 am	**Target Client Profile**
11:30 am–12:15 pm	**Defining Your Value Proposition**
12:15–1:15 pm	*Lunch*
1:15–2:00 pm	**Driving Client Referrals**
2:00–2:45 pm	**Art of the Sales Conversation**
2:45–3:00 pm	**SMART Goals and Action Items**

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