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Advisor Forum Program

GREENE CONSULTING

A comprehensive, 6-9 month program to equip Advisors with explicitly defined strategies, skills and practices that will lead to the achievement of their productivity potential and the consistent delivery of a differentiated Client Experience. (Program applies to any client-facing advisor, including Wealth Advisors, Portfolio Managers, Trust Advisors, New Business Officers and Planners.)

Program Focus

The Program focuses on Advisor mastery of the following **key skills** and **practice management disciplines** that are required to build a thriving wealth management practice, including:

- Benchmarking the advisor's Wealth Management Knowledge
- Developing a Quantified Plan to achieve Production Targets
- Compressing the "Time-to-Value" with prospects to enhance and accelerate the Sales Process
- Engaging prospects and clients in the Key Wealth Management Conversations
- Enhancing engagement with Business Owners and Corporate Executives
- Leveraging your planning platform functionality to deliver a collaborative, scalable Goals-Based Planning Experience
- Defined approach to Aggregate and Consolidate client assets
- Developing a differentiated approach to client meetings to deliver unique value and enhance client loyalty
- Establishing a strategic Pre-Call Planning Process to elevate client and prospect impact and advisor productivity

See the following pages for program details

Advisor Forum Testimonies

- *Thank you SO MUCH for the positive impact you've had on my career and my life. "I am SO blessed to be a part of this Forum."*
  Wealth Advisor
- *"The growth I have seen in my business is directly attributable to the time I spent with you …. I want to thank you from the bottom of my heart for having helped me change my life and accelerate my career."* **Financial Advisor**
- *"I cannot overstate how much this has helped me."* **Portfolio Manager**

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SESSION 1 Program Orientation (Includes Advisors and their Managers)

- Define Program Objectives, Requirements and Expectations for Advisors, Managers and Greene Consulting
- Overview of Each Session – What, Why and Expected Outcomes
- Introduction of Wealth Management Professional Knowledge Assessment
  - A unique assessment measuring advisor's wealth management knowledge – and confidence in that knowledge – relative to industry peers
- Prep for Session 2
  - Introduction of Practice Management Worksheet and Sales Process Exercise

SESSION 2 Defining your Sales Experience

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
Establishing your Sales Metrics	Practice Management Worksheet	Advisor equipped with a quantifiable plan to achieve production goals	Increased number of prospects entering the pipeline
Sourcing New Prospects	Practice Management Worksheet	Advisor equipped with a clear strategy for sourcing new prospects	Increased close ratio
Defining your Sales Process	Reverse-Engineering your Sales Process Exercise	Advisor equipped with a disciplined Sales Process that maximizes efficiency and effectiveness in the execution of the Sales Experience	Reduced calls-to-close

SESSION 3 Executing your Sales Experience

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
Defining your Client Promise	The Client Promise Module & Exercise Documentation	Advisor equipped with the ability to articulate to a prospect in a compelling way "the unique value you deliver to clients"	Increased close ratio
Defining your Discovery Process	The Client Discovery Module & Exercise Documentation	Advisor equipped with a defined approach to deeply and intimately understand what is most vital for their prospects to accomplish and why	Reduced calls-to-close
	Wealth Discovery RMI Template		

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SESSION 4 Delivering a Scalable, Goals-Based Planning Experience I

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Defining your Approach to Prospect and Client Engagement ▪ Positioning the Planning Experience	▪ The Rapid Planning Module I & Exercise Documentation	▪ Advisor equipped with a defined approach to engaging prospects and clients in a collaborative and scalable planning experience ▪ Advisor equipped with the ability to more effectively position the planning experience to maximize client interest in the process	▪ Increased Advisor adoption of goals-based planning ▪ Increased number of clients engaging in goals-based planning

SESSION 5 Delivering a Scalable, Goals-Based Planning Experience II

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Leveraging your Planning Platform Functionality	▪ The Rapid Planning Module II & Exercise Documentation	▪ Advisor equipped with the ability to effectively leverage your planning platform functionality to deliver an efficient and compelling experience	▪ Enhanced efficiency and productivity in Advisor's practice

SESSION 6 Delivering a Scalable, Goals-Based Planning Experience III

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Aggregating and Consolidating Assets	▪ The Rapid Planning Module III & Exercise Documentation	▪ Advisor equipped with enhanced skill and capability to aggregate client assets and consolidate assets trading away	▪ Increased revenue and revenue-per-sale

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SESSION 7 Mastering the Wealth Management Conversations

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Engaging Prospects and Clients in the Key Wealth Management Topics	▪ The Wealth Management Conversation Modules & Exercise Documentation	▪ Advisor equipped with the ability to engage clients in any of the key Wealth Management Conversations, without dependence on expert team members, in a way that leaves the prospect/client clearly recognizing any gaps in the management of their wealth and compelled to address them	▪ Increased prospect pipeline ▪ Increased close ratio ▪ Increased revenue and revenue-per-sale

SESSION 8 Delivering a Differentiated Experience with Business Owners and Corporate Executives

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Engaging with Business Owners	▪ The Business Owner Online Module & Exercise Documentation*	▪ Advisor equipped with the skills to engage Business Owners in a value-add, differentiated wealth management conversation	▪ Enhanced reputation internally and in the Business Owner/Corporate Executive Market ▪ Increased prospect pipeline ▪ Increased Revenue-Per-Sale
▪ Engaging with Corporate Executives	▪ The Corporate Executive Online Module & Exercise Documentation*	▪ Advisor equipped with the skills to engage Corporate Executives in a value-add, differentiated wealth management conversation	
▪ Generating Business Owner and Corporate Executive Referrals	▪ The Guide to Generating Referrals from Internal Partners and COI's	▪ Advisor equipped with an approach to enhance their value and referral volume with internal partners and COI's	

**The Business Owner and Corporate Executive modules offer optional enrollment in Professional Knowledge Courses to ensure Advisor has requisite knowledge to engage with Business Owners and Corporate Executives.*

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SESSION 9 Fostering Client Loyalty via the Relationship Management Experience

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Defining your New Client Onboarding Experience	▪ New Client Onboarding Guide	▪ Advisor equipped with a simplified and efficient onboarding process that serves to confirm the client's buying decision and inspire greater loyalty to you and your firm	▪ Increased client retention and client loyalty ▪ Expansion of existing client assets
▪ Defining your Relationship Management Experience	▪ Leading Differentiated Relationship Reviews Module & Exercise Documentation	▪ Advisor equipped with key tactics that serve to fulfill the key Client Loyalty Factors, convey unique value versus other advisors and consolidate assets trading away	

SESSION 10 Pre-Call Planning: Enhancing Client Impact and Productivity

Topic	Tools and Resources	Expected Outcomes	Productivity Impact
▪ Defining your Approach to Pre-Call Planning	▪ Prospect and Existing Client Pre-Call Planning Framework	▪ Advisor equipped with a framework that ensures the delivery of maximum value and impact in prospect and client engagements	▪ Increased prospect pipeline ▪ Increased close ratio ▪ Reduced calls-to-close ▪ Increased revenue-per-sale ▪ Enhanced client loyalty ▪ Increased client referrals

SESSION 11 The Journey Forward (includes Advisors and their Managers)

The final session (preferably in-person) is dedicated to an open forum discussion based on the following:

- Advisor documented submission of the key takeaways from the program, the skills/tactics they developed that proved to be of most importance to their practice, their commitments to continuous improvement going forward and how they expect it will impact them in terms of productivity in the next year.

NOTE: Each session (2-10) will begin with participants sharing their observations based on the action items required of them from the previous session.

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Additional Program Deliverables

- Access to Greene Consulting Online Wealth Management Conversation and Rapid Planning Modules throughout the course of the program
- Greene Consulting participation in one formal Pre-Call Planning Session per advisor as requested
- Ad Hoc Sessions to address specific issues and opportunities at group/advisor request
- Simplified Assessment Framework for managers to support advisor development
- Ongoing sharing of industry insight, ideas, and best practices

Program Delivery Options

- **Closed Enrollment**
  - This option is available to organizations who choose to have a dedicated Forum for their advisors.
  - Sessions will be delivered virtually with an in-person option for Sessions 1 (Program Orientation) and 11 (Capstone) crafted to align to your organization's overall client experience, deepen advisor engagement and enhance results.
  - Session Cadence can be every two weeks, every three weeks or monthly based on the organization's preferences.
  - Minimum requirement of 12 advisors with a maximum of 20.
- **Open Enrollment**
  - This option brings together individual advisors from various firms and locations.
  - All sessions to be delivered virtually.
  - Provides a unique opportunity to engage with peers throughout the industry.
  - Session cadence to be determined based on group input/preferences (every two weeks, every three weeks or monthly).
  - Minimum requirement of 10 advisors with a maximum of 20.

Program Pricing **$5,000 per Participant**

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