advisor2.0©
Advisor Forum Program

GREENE CONSULTING

Why pay to put ALL your advisors through training?

The Advisor Forum is a comprehensive, 9-month program designed specifically for *advisors yet to realize their productivity potential*, equipping them with explicitly defined strategies, skills and practices that will lead to accelerated achievement of their potential and the consistent delivery of a differentiated Client Experience.

Leveraging the experience and expertise of Greene Consulting, coupled with Best Practices shared among advisors from different firms throughout the country, participating advisors will leave the Program with the ability to confidently answer and deliver on the following questions:

- ***How do get more qualified prospects into my pipeline?***
- ***How do I engage those prospects to improve my close ratio, shorten the sales cycle and increase the revenue I generate from each sale?***
- ***How do I develop the knowledge and skills necessary to engage prospects and clients in all the disciplines of wealth management, and do so in a way that differentiates me from other advisors?***
- ***How do I leverage my financial planning software to engage more clients in a scalable goals-based planning experience that will accelerate my productivity?***
- ***How do I enhance the relationship management experience I deliver to more effectively expand existing relationships, strengthen client loyalty, and generate more client referrals?***

Program applies to any client-facing advisor, including Wealth Advisors, Portfolio Managers, Trust Advisors, New Business Officers and Planners

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 have been 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**

See the following pages for program details

Sessions Overview

Program Orientation

- Define Program Objectives, Requirements and Expectations
- Introduction of Wealth Management Professional Knowledge Assessment designed to measure advisor's wealth management knowledge – and confidence in that knowledge – relative to industry peers

Defining your Sales Experience

Expected Outcomes

Advisor equipped with:

- A quantifiable plan to achieve production goals
- A clear strategy for sourcing new prospects
- A disciplined Sales Process that maximizes efficiency and effectiveness in the execution of the Sales Experience

Productivity Impact

- Increased number of prospects Increased close ratio
- Reduced calls-to-close

Executing your Sales Experience

Expected Outcomes

Advisor equipped with:

- The ability to position themself and their firm in a uniquely compelling way that inspires prospect engagement
- A defined approach to the Discovery Conversation that ensures a deeper understanding of what is most vital for their prospects to accomplish and why

Productivity Impact

- Increased close ratio
- Reduced calls-to-close

Delivering a Scalable, Goals-Based Planning Experience

Expected Outcomes

Advisor equipped with:

- A defined approach to engaging prospects and clients in a collaborative and scalable planning experience
- The ability to more effectively position the planning experience to maximize client interest in the process
- The ability to effectively leverage your planning platform functionality to deliver an efficient and compelling experience
- Enhanced ability to aggregate client assets and consolidate assets trading away

Productivity Impact

- Increased advisor adoption of goals-based planning
- Increased number of clients engaging in goals-based planning
- Enhanced efficiency in advisor's practice
- Increased revenue and revenue-per-sale

Sessions Overview (*Continued*)

Mastering the Wealth Management Conversations

Expected Outcomes

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

Productivity Impact

- Increased prospect pipeline
- Increased close ratio
- Increased revenue and revenue-per-sale

Delivering a Differentiated Experience with Business Owners and Corporate Executives

Expected Outcomes

Advisor equipped with:

- The knowledge and skills to engage Business Owners and Corporate Executives in a value-add, differentiated wealth management conversation
- A differentiated approach to increase referral volume with Corporate, Commercial and Business Bankers and other COI's

Productivity Impact

- Enhanced reputation with COI's and in the Business Owner/Corporate Executive Markets
- Increased prospect pipeline
- Increased revenue-per=-sale

Fostering Client Loyalty via the Relationship Management Experience

Expected Outcomes

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
- The key tactics that serve to fulfill the key Client Loyalty Factors, convey unique value versus other advisors and consolidate assets trading away

Productivity Impact

- Increased client retention and loyalty
- Expansion of existing assets
- Increased client referrals

Pre-Call Planning: Enhancing Client Impact and Productivity

Expected Outcomes

- Advisor equipped with a framework that ensures the delivery of maximum value and impact in prospect and client engagements

Productivity Impact

- Increased prospect pipeline
- Increased close ratio
- Reduced calls-to-close
- Increased revenue-per-sale
- Enhanced client loyalty
- Increased client referrals

Program Deliverables and Delivery Options

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

- **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.
- **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.

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

For More information

- Visit us online: greeneconsults.com
- Give us a call: 404-324-4600