Certified Wealth Strategist®

Session II: Client Interaction Skills- Growing Your Business II

INSERT FIRM NAME HERE

INSERT DATES HERE

Time	Content	Objectives	Methodology
Day One: 8:30 AM – 8:50 AM	Welcome	• Welcome audience to the workshop • Review logistics • Review of Growing Your Business Blueprint	Interactive lecture
8:50 AM – 9:20 AM	Participant Success Stories	• Small group exercise o Participants to share and discuss Success Stories around the 12 Tactics from the Blueprint o Decide on best examples to share with the large group • Large group exercise o Facilitator will list and have an open discussion around the best examples from the small groups	Small & large group exercise
9:20 AM – 9:40 AM	Setup the Skills Practice	• State purpose and goals of the workshop • Discuss the skills the participants will be refining and practicing o Branding Message o Disciplined Interview Process o Pre-Planned Presentations	Interactive lecture
9:40 AM – 10:00 AM	The Branding Message	• Discuss why your Branding Message is so important • Review the format for the Branding Message • Facilitator models the use of the Branding Message o Initial prospects o Clients to reposition o Speech – Rotary / Special Events	Interactive lecture
10:00 AM – 10:15 AM	Scripting and Refining Your Branding Message	• Individual exercise o Participants recall their personal Branding Message o Participants prepare to deliver Branding Message for the following scenarios: ▪ Initial prospects ▪ Clients to reposition ▪ Speech	Individual exercise
10:15 AM – 10:25 AM	**Break**		

Certified Wealth Strategist®
Session II: Client Interaction Skills- Growing Your Business II
INSERT FIRM NAME HERE
INSERT DATES HERE

Time	Content	Objectives	Methodology
10:25 AM – 12:00 PM	Delivering Your Branding Message	• Small group exercise o Participants practice delivering their Branding Message in small groups for each scenario o Participants pick the best from their group to share with the large group • Large group debrief o Share best Branding Message from each group	Small & large group exercise
12:00 PM – 1:00 PM	**Lunch**		
1:00 PM – 1:30 PM	Overview of the Interview Process	• Review the components of pre-call planning • Present and discuss how to gain insight into the client's current situation, future, feelings and family dynamics • Present the 6-Step Interview Format 1. Frame the meeting with an agenda 2. Discuss your Branding Message/Repositioning Statement 3. Gather facts 4. Gain insight to identify gaps 5. Summarize and prioritize gaps surfaced 6. Establish next steps	Interactive lecture
1:30 PM – 2:15 PM	Questioning Skills	• Present and review questioning and conversation techniques o Facts o Issues o Consequences	Interactive lecture
2:15 PM – 3:00 PM	Case Analysis	• Small group exercise o Develop questions based on assigned client profile	Small group exercise
3:00 PM – 3:15 PM	**Break**		
3:15 PM – 4:30 PM	Build the Interview Format	• Instructor will lead participants through each step • Participants will build their interview format step by step • Participants will practice Steps 1,2, 5 and 6 with a partner before Instructor moves to the next step	Individual & small group exercise

Certified Wealth Strategist®
Session II: Client Interaction Skills- Growing Your Business II
INSERT FIRM NAME HERE
INSERT DATES HERE

Time	Content	Objectives	Methodology
Evening – Day One	**Homework**	• Review cases and instructions for homework activity o Participants will review 2 additional client scenarios to determine the issues for each o Participants will pick one client scenario that most likely represents the clients they serve to use in the interview and presentation role plays on Day Two	Individual exercise
Day Two: 8:30 AM – 9:15 AM	Recap of Day 1 and Overview of Day 2	• Summary of content covered in previous day • Review agenda and focus for upcoming day • Facilitator will model an effective interview meeting	Interactive lecture
9:15 AM – 9:45 AM	Role Play Preparation	• Participants to work individually to prepare for the Interview Role Play	Individual exercise
9:45 AM – 10:00 AM	**Break**		
10:00 AM – 12:00 PM	Role Play - Effective Interviewing	• Role Plays: Individuals will work in triads to conduct the interview meeting • Large group debrief	Role Plays and large group debrief
12:00 PM – 1:00 PM	**Lunch**		
1:00 PM – 1:45 PM	Overview of Presentation Skills and Format	• Review key presentation skills o Numeric framing o Bridging • Present the 7-Step Presentation Format 1. Review agenda and summarize current Gaps 2. Identify the Gaps to address today 3. Numerically frame the presentation points 4. Discuss each point 5. Describe the benefits of working with you and your team 6. Conduct a test close 7. Discuss steps to establish the relationship • Facilitator will model a presentation meeting	

Certified Wealth Strategist®
Session II: Client Interaction Skills- Growing Your Business II
INSERT FIRM NAME HERE
INSERT DATES HERE

Time	Content	Objectives	Methodology
1:45 PM – 2:15 PM	Build the Presentation Format	• Participants will build their presentation meeting step by step • Participants will practice each step with a partner	Individual & small group exercise
2:15 PM – 4:00 PM Includes break	Effective Presentations	• Role Plays: Individuals will work in groups of three to conduct the presentation meeting • Large group debrief	Role Plays and large group debrief
4:00 PM – 4:30 PM	Session Wrap Up	• Summarize key content from Days One and Two • Review next steps for Certified Wealth Strategist® designation o Program evaluation o Completing all components ▪ Assignments – Readings, Audio ▪ e-Learning ▪ Online Exams o Review of the Capstone Project • Action plan to drive revenue	Interactive lecture