ProGrowth Rainmaker Workshop Agenda

As a participant in this workshop, we welcome you this morning for a comprehensive opportunity to learn the key elements of the ***ProGrowth Execution Model and the Integrated Practice Management System*** that has helped hundreds of professionals just like you to accelerate their career and income. Your success will depend on your commitment to the process and your desire to achieve the life you want.

I. Introduction & Set Up 8:00 – 8:30 A.M.

- ***a. Introduction of each participant and what their objectives are in participating***
- ***b. Benefits and Use of the IPMS***
  - i. Provides the structure and tools to stay the course
  - ii. Always accessible
- **c. Getting Set Up**
  - i. The "Account" section – Your personal information

II. Understanding Your Social Style - 8:30 – 9:30 A.M.

- **a. Using it as a strength**
- **b. Understanding of the DISC Profile**
- **c. Take the DISC Profile**
- **d. Interpreting results**
- **e. Saving results to your profile**

-------BREAK-------

III. Crafting your Plan – Creating Clarity – 9:45 - 11:45 A.M.

- ***a. Purpose of a Plan***
  - i. Clear road map as to what will be accomplished
  - ii. Ability to communicate clearly to others so they know how to help
- ***b. Using the Action Plan Wizard***
  - i. How to use it
  - ii. Create an initial draft
  - iii. Make changes to the plan as needed
  - iv. Being clear about what will be accomplished
- ***c. Developing the Plan***

i. Establishing income objectives
ii. Targeting revenue needed to achieve the income
iii. Understanding where the revenue will come from
    1. Choosing the markets
    2. Identifying the market segments clearly
        a. Importance of clearly describing the market segments
        b. Average fee per client
iv. Increasing the presence in your marketplace
    1. Positioning yourself as an expert
    2. Presenting to audiences with other professionals/members
v. Assessing the business issues that can impact the practice/business
    1. Strategic – Long term issues to consider that may enhance the business
    2. Operational – Issues that impact the actual conduct and execution of services
    3. Financial – Issues where capital or debt will be needed to finance current or future operations
    4. Personnel - Issues related to the personnel needed to execute the services and/or grow the business
        a. Partners
        b. Employees/I.C
vi. Now that you have a plan - Articulating what you do concisely
    1. Your 30 second elevator speech

-----------LUNCH – 12:00-1:00 P.M.-----------

IV. The Relationship System - Key To Client Acquisition –1:00 – 2:30 P.M.

a. Purpose of a relationship system
i. The distribution system of a business
ii. Creates predictability to the acquisition of clients/customers

b. Overview of the ProGrowth Relationship System
i. How it works
ii. Why it is important to segregate from the contact management system
iii. Importance of consistent management of the system
iv. Benefit of having it part of the IPMS

c. Adding Level II Candidates
i. Through Outlook

ii. Through the IPMS
iii. Adding manually

*d. **Managing the relationship system***

i. Importance of consistency

1. Results will yield effort expended
2. Moving target – lives change

ii. Level II candidates

1. Moving up or moving out
2. Due diligence – 3 hurdles
3. Touches
4. Touch history – important at conversion
5. Using the system to be consistent in your touches – reminder

iii. Level I relationships

1. Conversion
    a. Must have explicit agreement
    b. Important to record monthly meeting results
2. Level I standard must be present
    a. Circumstances change
    b. Removal

iv. Archived Individuals

1. Can be added back to relationship system
2. Data remains intact

v. History

1. Can review timelines for relationship development

------BREAK ------

V. Execution of The Plan – The Monthly Progress Report - 2:45 – 3:30

a. Purpose of the Monthly Progress Report

1. Assessing the progress towards achieving the stated objectives
2. Identifying the small steps that will lead to big things
3. Have a monthly roadmap to stay on course – maintain focus
4. Chronological progression to achieve objectives
5. Enlisting TEAM member support

b. Markets – Ideal Clients

1. Importance to account for activities
2. First Box
    a. Account for all activities in each market
        i. Anything that may have relevance

3. Second Box
    a. Identify the key issues to focus on the following month
        i. Specific actions to take that will move you forward
        ii. Be clear and specific – this will help TEAM members know how to help

c. Relationship System

1. Critical to client acquisition
2. Level One conversion
    a. Number converted – If zero than zero
    b. Identify specific individuals
3. Level Two Candidates
    a. Number identified
    b. Specific individuals

d. Creating a presence

1. Specific action steps taken to position as an expert
2. Greater awareness to others

e. Client acquisition

1. Result of focusing on the process
2. Bottom-line results

f. TEAM Summary questions – *Do not leave blank*

1. Important to identify activity for members
2. Challenges – your chance to get member input
3. Prospective cos. – cite specific prospects/suspects
4. Other – Any issue that you need member awareness

VI. Your Profile (one sheet) - Communicating To Others - - 3:30 – 4:15 P.M.

a. Purpose of the Profile

1. Communicate to others how they can help you
2. Give others the information they need to determine if a Level I relationship is possible
3. An instrument to leave with others (one sheet)
4. A marketing piece for others to leave with potential clients

b. Your specialty

1. Important to be clear but concise
2. Speak only to the technical nature of what you do

c. How you differentiate

1. What sets you apart from competitors?

2. Why do clients work with you?
3. Important not to be generic

d. **Questions for others to ask on your behalf**
    1. They must be compelling
    2. Should be disturbing
    3. Fewer is better than many that confuse

e. **Disciplines that make good Level II candidates**
    1. Be specific
    2. List all likely candidates

f. **Professional Organizations**
    1. Let others know the groups you are involved with
    2. List groups that you might like to join – others can help

g. **Personal Information**
    1. We all start with a personal relationship
    2. Offer information that will let others know get to know you
    3. Personal interests always create conversation

VII. Your Dashboard – 4:15 – 4:30 P.M.

a. ***Keeping on top of your plan to get the results you want***
    i. My Plan
    ii. My Relationship System
    iii. New Clients
    iv. My Branding Activity

b. ***IPMS Tools***
    i. Training videos
    ii. Ease of use in managing your business.
    iii. Access for one year

VIII. Initial Homework

a. **Level II Candidates**
    i. Identify all potential candidates in your contact management system and add them to the relationship system
    ii. Will give you a snapshot of how strong your relationship system may or may not be

b. **Review your plan and Profile to insure that they clearly communicate your intentions**

IX. Complete Survey

Thank You for Attending – We wish you much success!