

BUILD ORGANIC GROWTH

PROGRAMS THAT DRIVE ACTION & ACCOUNTABILITY



Stop looking for growth in all of the wrong places!

If you need to get out of a growth rut, The Collaborative offers a variety of tools to increase new client acquisition. You can choose from four different approaches to meet your team's specific needs—approaches designed to meet your business objectives and developed to meet the needs of different learning styles.

1. One-to-One Coaching with a Seasoned Industry Expert

- Assess what's working and what's not – develop a joint Desired Outcome statement
- Apply our trademarked S.H.I.F.T. Coaching Methodology to help you reach your goals
- Speak once per month via phone or in person, depending on location

2. Monthly Webinars with Follow-Up Coaching

- Ideal for teams with 3 or more people.
- Jointly develop a schedule of topics to be delivered each month via webinar
- Follow up with a phone call to each participant during the month to establish a personal Desired Outcome, ensure the concepts are being applied, and provide feedback
- Typically runs over a 3-, 6-, or 12-month period in order to gain the best results

3. Online Self-Paced Training

We have developed a number of online training programs where an advisor can access information at their convenience. This package includes:

- Individual Growth Modules based upon *The Pocket Guide to Sales for Financial Advisors*
- Worksheets to self-guide each individual step
- Videos outlining key strategies like Personal Productivity
- Tools to help with communication, brand building, and more!
- Check-in call once per month to ensure the participant is on track

4. In-Person Group Training

- Can take place at your office location or offsite
- Structured around your timing – 1.5 hours to 2.5 days
- Proprietary, proven content customized to your needs

All programs include a focus on:

- Developing a plan for organic growth
- Selling for the non-sales professional
- Uncovering client referrals
- Accelerating center of influence referrals
- Storytelling for referrals and sales success
- Communication strategies to increase sales
- Personal productivity to allow for focus on the selling process
- Leveraging your brand effectively



We're ready to help!

Visit us at the-collaborative.com
or give us a call at 508-359-8216