SHARPEN YOUR GAME
CHICAGO, IL
June 7-9, 2017

Thursday

2:15 - 2:45
Concurrent Breakout Sessions

- Consistent Triples & Doubles with Your Client Contacts

John Foley • Tawanna Brown

Client Scheduling Process

John Foley

Tawanna Brown

Monthly Client Contact Process

- Routine system that determines who should be called and the course of action to be taken. The Process ensures every Client, Prospect and Referral will be contacted at a minimum twice a year (every six months). The point of the call is to schedule an appointment, look for new opportunities, or touch base to make sure everything is up-to-date.

Origin of the Idea

- Strategic Coach

  www.strategiccoach.com

  --Unique Ability

Training

- Gina Pellegrini

  www.Pellegriniteam.com

  --The Revenue Resource

- 8 one hour call training sessions with Gina Pelligrini
- Learn strategies to schedule appointments consistently
- Ideal Week-- create an Ideal Week for appointment stream

THE REVENUE RESOURCE

A TELECONFERENCE SERIES WITH GINA PELLEGRINI

Pellegrini

Call #1 (Advisors and Marketing Coordinators)
- Clarify Advisor's role and expectations for appointment scheduling
- Create an Ideal Week for appointment stream
- Explain value of check-in calls
- Examine ways to increase referrals/Centers of Influence
- Prepare/explain call lists; establish communication process; build accountability
- Determine number of calls per day

Call #2 (Marketing Coordinators)
- Explain tracking dials
- Demonstrate how and when to leave messages
- Schedule time slots for telephone calls
- Discuss overcoming objections, getting past gatekeepers, etc.
- Explain importance of keeping notes in database
- Review phone scripts; prepare for role-playing

Calls #3, 4 (Marketing Coordinators)
- Review calling results
- Identify obstacles to appointment scheduling
- Role-play with existing clients and referrals

Call #5 (Marketing Coordinators)
- Review calling results
- Identify obstacles to appointment scheduling
- Role-play with seminar follow-ups, cold calls, etc.

Call #6 (Advisors and Marketing Coordinators)
- Recap progress of program
- Review strategies for staying on track
- Re-examine ways to increase referrals and Centers of Influence
- Emphasize marketing coordinator's role in driving marketing game plan

Call #7 (Marketing Coordinators)
- Review progress; discuss obstacles
- Continue role-playing

Call #8 (Marketing Coordinators)
- Review progress
- Discuss new marketing ideas for and from marketing coordinators

"I just got an appointment after going through 3 objections based on your language. And, he already had an advisor he was happy with."
-Sally G., Marketing Coordinator

Are you getting the most out of your client base? The Revenue Resource is an interactive teleconference series for Advisors and marketing coordinators. In eight, one-hour calls, I explain how to increase appointments and referrals by mining your client base and improving telephone techniques.

Basically, I explain how to leverage your time to increase sales. Marketing coordinators learn strategies to schedule appointments consistently, and Advisors develop trust to let go of all their calls. The result? Better client management and more revenue from your untapped gold mine!

As an experienced trainer, I use role-playing with marketing coordinators to improve verbal skills and build confidence. Marketing coordinators practice their phone language and receive immediate feedback on getting returned calls, overcoming objections, and so much MORE.

At Pellegrini Team Consulting, we've helped business teams reach their full potential for more than 25 years. After experiencing The Revenue Resource series, your marketing coordinator will be able to make any type of call. Sign up today, it works!

All calls are one hour

$2,500/Advisor &
1 marketing coordinator

($1,000 for each additional marketing coordinator)

Maximum 10 marketing coodinators per series

The Process

- On the 22nd of each month the Advisor and Scheduler review Call Lists
- Quarterly, Semi-Annual, Yearly, Birthdays, COI

Quarterly Client List

Quarterly Review Clients											
Firstname	Lastname	Date of Birth	Status	Last Meet	City	State	Phone	Champaign	Client Office	Decatur	Other
January, April, July, October											
Bill	Gladston	1/4/1958	A	42684	Wheaton	IL					
Jim	Fontainne	1/17/1942	A	42852	Champaig	IL					
February, May, August, November											
Jenny	Boise	02/15/1934	A	42692	Urbana	IL					
March, June, September, December											
Gladys	Coal	03/10/1964	B	42710	Brookfielc	WI					
David	Gomez	03/12/1952	A	42713	Paris	IL					
April, July, October, January											
William	Sholey	22007									
Irma	Whitfield	22036									
May, August, November, February											
Melford	Goldstein	05/02/1961	A	42710	Princeton	IN					
Heidi	Barker	05/25/1937	A	42685	Champaig	IL					
June, September, December, March											
Maureen	Cho	06/01/1952	A	42726	Blooming	IL					
Brandy	Hutt	06/22/1955	A	42731	Forsyth	IL					
July, October, January, April											
Damien	Lee	07/24/1942	A	42683	Fairborn	OH					

Semi-Annual Client List

Semi-Annual Review Clients 2017

Review Schedule	First Name	Last Name	Status	Indv Type	Birthdate	Review Schedule	City	State	Phone	Champaign	Paris	Marshall	Cliet Office	Other
Semi-Annual	Tori	Amison	A	Client	3/27/1956	March/Sept	Marshall	IL						
Semi-Annual	Jill	Macabee	A	Client	12/6/1985	Dec/June	Mahomet	IL						
Semi-Annual	Burnson	Williams	**B**	Client	1/9/1948	April/Oct	Champaign	IL						
Semi-Annual	John	Matsuo	A	Client	2/6/1969	Feb/Aug	Champaign	IL						
Semi-Annual	Kyle	Mayhee	B	Client	8/29/1942	Aug/Feb	West Union	IL						
Semi-Annual	Verna	Bell	A	Client	3/6/1951	March/Sept	Le Roy	IL						
Semi-Annual	Tammy	Iglesias	A	Client	9/6/1962	March/Sept	Mahomet	IL						
Semi-Annual	Paula	Goldberg	A	Client	4/17/1965	April/Oct	West Lebanon	IN						
Semi-Annual	Vernon	Wade	B	Client	12/15/1971	Dec/June	Champaign	IL						
Grand Totals (8 records)														

Annual Client List

Review Schedule	First Name	Last Name	Status	Individual Type	Legal City	Legal State	Phone	Champaign	Paris	Marshall	Client Office	Other
Annual - June	Thomas	Roberts	A	Client	Paxton	IL						
Annual - June	Candy	Brighton	A	Client	Dennison	IL						
Annual - June	Daniel	Rivera	A	Client	Champaign	IL						
Annual - June	Conrad	Richards	B	Client	Neoga	IL						
Annual - June	Ming-See	Han	B	Client	Champaign	IL						
Annual - June	Phyllis	Gladney	B	Client	Sibley	IL						
Annual - June	Brad	Swan	C	Client	Springfield	IL						
Annual - June	Emma	Johnson	C	Client	Marshall	IL						
Annual - June	James	Tilney	C	Client	Sun City	AZ						
Annual - June	Jennifer	Stonely	Prospect	Client	Marshall	IL						
Annual - June	John	Weinstein	Prospect	Client	Urbana	IL						

COI – Center of Influence

Centers of Influence	Business Name	Phone #	January	February	March	April	May	June	July	August	September	October	November	December	Hobbies	Referrals	Results
Richie, Burt Attorney	Miller & Blake 555 S. 5th Street Marshall, IL 55555																
Gary, Bridgette CPA	Weinstein & Associates 555 S. 5th Street Marshall, IL 55555																
Slaw, Robert Attorney	Patel & Schuler 555 S. 5th Street Marshall, IL 55555																
Takata, Jenny Attorney	The Estate Center 555 West 5th, Salem, IL 55555																
Brown, Bruno CPA	Gorley, Chrisman & Tate 555 S. 5th Street Marshall, IL 55555																
Brookes, Kelly Accountant	Brookes Accounting Service 555 W. 5th Street, Monticello, IL 55555																

Birthdays

June 2017 Birthdays

Salutation	First Name	Last Name	Birthday This Year	Age as of next Birthday	Birthdate	Contact Record Type	Individual Type	Status
Mr.	James	Blake	6/1/2017	45	6/1/1972	Client	Client	B
Ms.	Phillip	Jackson	6/1/2017	65	6/1/1952	Client	Client	A
Mrs.	Jeannie	Cooper	6/2/2017	45	6/1/1972	Client	Client	B
Mr.	Bert	Winston	6/5/2017	56	6/1/1961	Client	Client	B
Mr.	Manuel	Gonzalez	6/7/2017	57	6/2/1960	Client	Client	C
Mrs.	Leesa	Pettigrew	6/9/2017	59	6/2/1958	Client	Client	B
Mr.	Steve	Lambert	6/11/2017	48	6/8/1969	Client	Client	D
Dr.	Melissa	Ye	6/17/2017	83	6/8/1934	Client	Client	A
Mrs.	Sarah	Christman	6/22/2017	43	6/10/1974	Client	Client	A
Mr.	Amal	Hassan	6/27/2017	70	6/10/1947	Client	Client	B
Grand Totals (10 records)								

Advantages

- Advisor develops trust to let go of all their calls, including new referrals.
- Advisor has peace of mind that all clients and prospects are being contacted at least twice a year
- Decreases “Cherry Picking” the client base
- The Advisor is freed up to do the most important activity which is being in front of potential opportunities.
- Scheduler becomes an income generator for the Advisor by filling the calendar.

Success Stories

- New Business
  - Dwight
  - Larry
- Happy Clients
  - Mike C
  - Michael B