

INSPIRE GROWTH

FINANCIAL ADVISOR

GROWTH WORKSHOPS

# Growth Workshop Jumpstart

A process for financial advisors to get clear and confident on the essential components to take inspired action

## Impact

**Overcome busyness, lack of know-how and fear to ignite your growth.**

An interactive group course. Learn the four essential components of growth and how to apply them in your business.

**5**  
Modules

**6**  
Accountability  
Assignments

**Live**  
Consulting

## Curriculum

<b>Module 1</b> The Roadmap to Growth
<b>Module 2</b> Goals & Habits that Drive Results
<b>Module 3</b> Developing a Growth Niche
<b>Module 4</b> Failure Proof Your Plan
<b>Module 4</b> Live Q&A

## Assignments

Pre-Work: Dream Bigger  
Growth Blueprint

SPA Goals

Ideal Client Profile

Momentum Goal

1-Month Progress Check

# Growth Workshop Convert

Financial Advisor sales essentials, close more business and build advocates

## Impact

**You have a lead, now what? Develop a sales process and the skills to close more business.**

An interactive group course. Develop a sales process, core sales pieces and the skills to close.

## Overview

**5**  
Modules

**6**  
Accountability  
Assignments

**Live**  
Consulting

## Curriculum

<b>Module 1</b> Converting Leads to Clients
<b>Module 2</b> Developing Client and Professional COIs
<b>Module 3</b> Advisor Sales Skills
<b>Module 4</b> Sales In Action
<b>Module 4</b> Live Q&A

## Assignments

Pre-Work: Dream Big Pipeline Process

COI Playbook

Sales Skill Toolkit

Sales Content Toolkit

1-Month Progress Check

# Growth Workshop Unstoppable

Become a sustainable high performer to persist through all business and market cycles, grow and avoid burnout.

Impact	Overview	Curriculum	Assignments
<p><b>80% of growth is the belief that it's possible. Develop the mindset and habits to conquer your goals and build your future business.</b></p> <p>An interactive group course. Become a sustainable high-performer and have more fun in your business.</p>	<b>5</b> Modules	<b>Module 1</b> The Power of Belief	Pre-Work: Your Future Firm Start With Strengths
	<b>6</b> Accountability Assignments	<b>Module 2</b> Overcome Common Challenges	An Environment For Success
	<b>Live</b> Consulting	<b>Module 3</b> Showing Up Energetically	Intuition Scavenger Hunt
		<b>Module 4</b> Recover to Receive	Recovery Playbook
		<b>Module 4</b> Live Q&A	1-Month Progress Check