

TRAINING CAMP

A Growth Program for Financial Advisors

Training Camp is a structured coaching program designed to help advisors optimize operations, elevate client service, and accelerate growth through six focused strategy sessions led by experienced consultants.

1 Business Review	<p>Evaluate the current state of the practice and establish priorities for improvement.</p> <p>KEY FOCUS:</p> <ul style="list-style-type: none"> • Advisor questionnaire review • Business structure and processes • Growth opportunities
2 Tech & CRM Optimization	<p>Improve operational efficiency through better use of CRM systems and workflows.</p> <p>KEY FOCUS:</p> <ul style="list-style-type: none"> • Client data organization and cleanup • Workflow design and automation • Reporting and performance tracking
3 Client Service Model	<p>Create a scalable service structure aligned with client value.</p> <p>KEY FOCUS:</p> <ul style="list-style-type: none"> • Client segmentation and tiering • Service standards by client tier • CRM workflow implementation
4 Marketing Strategy	<p>Define the ideal client and develop a clear market position.</p> <p>KEY FOCUS:</p> <ul style="list-style-type: none"> • Target audience and niche • Messaging and differentiation • Strategic positioning
5 Marketing Application	<p>Develop a structured approach to outreach and business development.</p> <p>KEY FOCUS:</p> <ul style="list-style-type: none"> • Channel selection and evaluation • Content strategy • Marketing cadence and consistency
6 Coaching & Execution	<p>Translate strategy into action with measurable goals and accountability.</p> <p>KEY FOCUS:</p> <ul style="list-style-type: none"> • Review and refinement of prior sessions • Implementation roadmap • Defined goals, timelines, and next steps

Program Coaches

Erik Sauer – Coaching & Consulting
Garland Scott – Business Development
Brad Clough – CRM & Technology
TBD – Marketing Consulting