1634 Harvey Avenue, Suite 300
Kelowna BC V1Y 6G2
Canada

# The Pareto System
# -Virtual Coaching Program-
## Fact Sheet

**6 month Virtual Coaching Program:** 12 conference calls every other week over 6 months.

**Each call has the following features:**

- Web-based presentation and conference line
- 45 minutes of new content and implementation strategies
- 30 minutes for questions
- Two certified senior Pareto Consultants
- Participants can prepare for the call by reviewing material on the Pareto Proven Strategies website.

**The Virtual Coaching Program is a systematic program designed to allow you to:**

***Run your business so that it doesn't run you!***

- Be more efficient and profitable
- Establish a stream of quality referrals
- Build and competitor-proof fiercely loyal advocates
- Restore liberation and order to your life

**A six month subscription to the Pareto Platform powered by Microsoft Dynamics CRM** is included to facilitate deeper understanding of the process and allow for effective implementation.

**Two follow up conference calls** will be provided to ensure implementation for the Participants 60 and 120 days after the completion of the six month program.

**Background on Pareto Systems**
Pareto Systems is a leading business development consulting firm and an application service provider. We provide proven business development, practice management and marketing solutions to top financial advisors and wholesalers throughout North America through our speakers and through our consulting services.

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| **Fee for a Single Advisor – Retail:** | $1,495.00 |
| **Fee for a Single Advisor – Corporate:** | $ 950.00 |

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**The Virtual Coaching Program outline is as follows:**

Strategy Session #1: The Current State of Affairs Part 1

- Program introduction and setting of expectations.
- Establishing a framework for relationship based client classification.
- Putting the advisor in charge of determining the types of clients they want to work with

Strategy Session #2: The Current State of Affairs Part 2

- Creating a framework for client classification is one thing. The hard part is now putting it to use.
- This session will examine client classification and go through examples of pitfalls to avoid.
- At the end of this process an advisor will have a crystal clear picture of where the value is in their business and what the desired endgame is.

Strategy Session #3: Advocate Service

- Do not give clients what they expect, give them what they will love.
- Create a service program founded on proven strategies.
- Solid, trust-based relationships are all about consistently being in touch with clients in a variety of meaningful ways over the course of a year.
- Automating and delegating meaningful service creates raving fans, and subsequently, referrals.

Strategy Session #4: The Organization

- This session is all about creating organization and clarity about how the business operates.
- Define who does what activities and how each activity is done.
- Each participant will complete an Organization Chart and begin creating a procedures manual.

Strategy Session #5: The New Client Process Part 1

- A proven process to ensure that you have an airtight process to ensure that only the right clients work with you.
- Part 1 will focus on the principles of the New Client Process and begin work on the first stages of that process.
- This session includes the creation of an Introduction Kit.

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Strategy Session #6: The New Client Process Part 2

- This session will focus on the first meeting with a potential client.
- This meeting is designed to ensure that the potential client and the advisor make a fully informed decision about working together.
- Implement the FIT Principle. A proven method for ensuring that a forthright trust-based relationship gets started the right way.

Strategy Session #7: The New Client Process Part 3

- The advisor uses the information-gathering process to reinforce the New Client Process and create anticipation about the process you are mutually engaged in.
- It is in this appointment that the client is enlightened about the advisor's Introduction Service. There is no better way to build professional referrals.

Strategy Session #8: The New Client Process Part 4

- This session is all about implementation.
- This is the culmination of the process that started with the first appointment.
- During this session a powerful tool will be introduced as a resource for an advisor to continue adding long-term value to their client's financial well being.

Strategy Session #9: The New Client Process Part 5

- The new client process is not complete until a client has been properly welcomed.
- This proven process covers the subject of anchors to start this new relationship.
- This session also covers how to conduct review appointments in the future to ensure that relationships continue to grow and deepen.

Strategy Session #10: The Existing Client Process

- It is imperative that existing clients understand and experience the evolution of the advisor's business.
- This process ensures that all existing clients understand where their relationship with their advisor is going in the future.
- All existing clients will move forward in a spirit of mutual trust and cooperation.

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Strategy Session #11: Implementation and Challenges

- During this session we will ensure that any implementation issues are dealt with before the final session.
- As advisors begin implementing, they run into various challenges that need to be ironed out.

Strategy Session #12: Review, Reality Check and What's Next.

- Change and evolution is one thing. Ensuring that the advisor continues moving forward and makes lasting change is critical.
- This session sets up a final review and establishes a process for the advisor to continually review and evolve their business.
- Also in this session the advisor will set up a process for hosting the first instance of an annual event to be held for their best clients. There is no better way to say "Thank you for your continued trust and confidence"

**Participants qualify for discounts on Pareto Systems Individual Consulting Programs.**