ZERO Cost Coaching PLUS

From Pareto Systems

Building Trusting Relationships for Accelerated Growth

Introduction

This program is designed for an advisor, or advisory team, who agrees with the philosophy of Pareto Systems and is motivated to implement the strategies presented. The ZERO Cost Coaching PLUS program is delivered through one-on-one interaction with a dedicated consultant and makes use of the online Pareto Platform. The program consists of 16 strategies. Each strategy is self-contained and contains instructions and media files to provide turn-key implementation with minimal customization.

Time required:	18 months
Time requirement:	1 to 5 hours per week
Fee:	$22,500 @ $10,685 upfront plus $695/month for 17 month
Fee per additional advisor:	$2,500

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systems in action

Outline

Session 1: **Introduction & Orientation**

- Program introduction and setting expectations.
- Review and discussion of philosophy and client's desired outcomes and present state of business.

Session 2: **Ideal Life**

- Understand motivations.
- Organize time and create time scarcity.

Session 3-4: **The Introduction Process**

- Never ask for referrals again.
- Uncover the dynamics of referrability.
- Customize and implement a referral process designed to be professional and positioned as a service.

Session 5: **The Introduction Process – Video Coaching**

- Video review and implementation coaching on your Introduction Process.
- Refine the delivery of your process for referrals so that it is professional and flawless.

Session 6: **Current State of Affairs Part 1**

- Establish a framework for relationship-based client classification and future growth.
- Put the advisor in charge of determining the type of clients they want to work with.

Session 7-8: **Current State of Affairs Part 2**

- Implement the client classification framework to gain clarity on where the value really exists in your business.
- Maximize advocacy by organizing your clientele with a relationship-based classification process.

Session 9-17: **The New Client Advocate Process**

- A proven approach to ensure that only the right client gets the opportunity to work with you.
- Create a unified and consistent message and process for working with your clients through their lifetime.
- Video review and implementation coaching on your meetings.
- Further refine the delivery of your process for referrals so that it is professional and flawless.

Session 18-22: **Existing Client Advocate Process**

- Existing clients need to understand and experience the evolution of your business.
- This process ensures that all existing clients understand where their relationship with you is going in the future.
- All of your existing relationships will move forward in a spirit of mutual trust and cooperation.
- Video review and implementation coaching on your meetings.
- Refine the delivery of your process for referrals so that it is professional and flawless, and customized specifically for existing clients.

Session 23: **Maximizing Review Meeting**

- The legacy of a client relationship is all about trust.
- Ongoing review meetings must reinforce trust and confidence in the advisor/ client relationship.

Session 24-27: **Build Trusting Relationships & Creating Advocacy**

- Don't give clients what they expect, give them what they will love. Create a client advocate program founded on proven strategies.
- Leverage time, energy and money resources in the process of enhancing client trust and loyalty.

Session 28-31: **Business Management**

- A well-run, professional business does not happen by accident.
- Create organization and clarity in the operation of your business.

Session 32-33: **Reality Check**

- Staying the course is all about constant review of the course you have set for yourself.
- The Reality Check is a legacy of implementation and is designed to ensure implementation remains front and center in all of your activities.

Details

- The Program is delivered and supported by one-on-one consultation between the Client and a designated Implementation Consultant from Pareto Systems.

- The intent is to complete the Program in 18 months from the Agreement Effective Date. Exception will be made in the events of illness, extended holiday/vacation and/or family emergency.

- Sessions will be held on a bi-weekly basis.

- Pareto Systems includes a fully paid 18-month subscription to the Pareto Platform.

- Client will receive a full refund of their program fees if they have not earned back the cost of the program within 9 months of the start date.
    - Details will be provided in program contract.

- Upon completion of The Pareto System the Client qualifies to apply for:
    - The Pareto System – Implementation Support Program.
        - The intent of this program is to take implemented concepts to a higher level by focusing on a customized program for advanced implementation.
    - Pareto Approved
        - The Pareto Approved designation is a benchmark of assessment that gives the advisor and their team the opportunity to demonstrate mastery of The Pareto System and its concepts.