



The Pareto System -Virtual Coaching Program- Fact Sheet

The Virtual Coaching Program: 4 conference calls held every 2 weeks for 2 months.

Each call has the following features:

- Web-based presentation and conference line
- 30 minutes of new content and implementation strategies
- 15 minutes for questions
- Two Pareto Consultants
- Participants can prepare for the call by reviewing material in the Virtual Coaching section of the Pareto Platform.

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

The Virtual Coaching Program is included with a Pareto Platform subscription.

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.

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 action. 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: Building Referrals

- Gain insight into the dynamics of how referrals happen and how you can leverage your clients desire to be helpful to others.
- Discover how to integrate the process of referrals and introductions into the building blocks covered in the first three sessions.

