

TRAINING MENU

A complete selection of presentations, seminars and ongoing training programs designed specifically for your firm and for your goals

Starters (90 minutes with follow up package)

Contact for
Pricing

Maximizing Client Referrals—The largest, most reliable, most cost-effective source of new clients is often neglected. Various techniques and processes will be served for everyone's style and taste.

Secrets in Closing More Business—21 specific tips on better prospects, better meetings, new opportunities and capturing more business. Easy to follow and implement without additional training.

Business Etiquette—Not Just Eating With the Right Fork—An opportunity to shine in every situation and put your best foot forward for those important meetings and first impressions. Establishing a healthy business climate reaps rewards you can take to the bank.

Top Choices (Advanced program, training and implementation)

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Pipeline Process Management—Identifying opportunities is not enough. Follow up and holding each other accountable and pooling knowledge resources closes business. Capitalize on business development efforts and don't let opportunities fall in the crack because of working on client issues.

COI Tracking Process Management—Meeting with referral sources is critical, but having a logical, accountable method and process for meeting with Centers of Influences build business and improves efficiency for your non-billable time. A custom process helps increase close ratios and provides a coordinated effort.

Strategic Prospect Targeting—Building a prospect list is essential, but building one that strategically matches your firm's expertise and resources builds business. With this process, you can immediately begin to develop and objectively evaluate your prospect target list and make it an efficient, strategic process.

Future Considerations (90-minute to full day)

Contact for
Pricing

- *Quantifiable Marketing*
- *Developing the Next Generation of Leaders*
- *Presentation Skills*
- *Marketing and Sales—Where is the Line?*
- *Networking Relationships*
- *Networking Skills*
- *Client Service*
- *Living Your Firm's Brand*
- *Developing a Referral Network*
- *Relationship Building*

XPECTMarketing

Strategic Positioning for Growth

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