Sample Outline of a Private Onboarding Call with New Coach-in-Training

Profit Advisors™ Certification Program

AGENDA FOR PRACTITIONER ONBOARDING CALL:

1. Introduce our CEO; cover any outstanding billing or shipping issues; say "Because the holiday period affected the schedule, we've adjusted your license so that the clock starts February 1st instead of in December when you registered."

2. Introduce Practitioner's Customized Marketing Tools
   a. Webpages -- 2-page site/special report/ARs; how Profit Advisor can deploy
   b. Calculator -- How it works; how Profit Advisor can access/use
   c. Press release -- We will deploy; gather response info for CTA
   d. Email -- How to contact InfoUSA; Profit Advisor 's allotment; we write email
   e. Profit Advisor Profile Page for our website – we'll send a form asking for bio/photo/specialties/contact info
   f. Advisor's plan for marketing -- their industry/region/initial focus – we can juggle the focus for you

3. Actual Consulting Process and Consulting Tools
   a. Check to see how far Profit Advisor has gotten with review of home-study
   b. Materials ready week from Monday; will post at Advisors' private website – 12 modules; new client interview questionnaire; sample client-engagement letter; your first 30 days checklist; future goals interview questionnaire to convert clients to an ongoing consulting relationship (later)
   c. How to access Private Pass area – we will email YOUR unique logins
   d. How to onboard an account – sign them up; set a schedule for the meetings; price the materials extra if you want; determine how many client staff will be at each meeting; pricing will be between $12-$15 per workbook; manual is going to be priced at $200 per unit which you can mark-up to $497 or higher if you like (we sell it at $497).

4. Training Schedule
   a. Strategy Sessions (normally monthly, but we want to cover a lot in next 3 months)
      i. Monday, Jan 27 (1:00pm PST) – "How to Use the 35-Point Audit to Close Clients"
      ii. Monday, Feb 10 (1:00pm PST) – "How to Onboard a Client"
      iii. Monday, Feb 24 (1:00pm PST) -- "How to Advise Clients on Establishing Systems"
      iv. Starting in March, we'll go to once a month
   b. Coach-on-Call schedule
      i. Initial schedule -- Thursdays, 9:00am to 11:00am

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