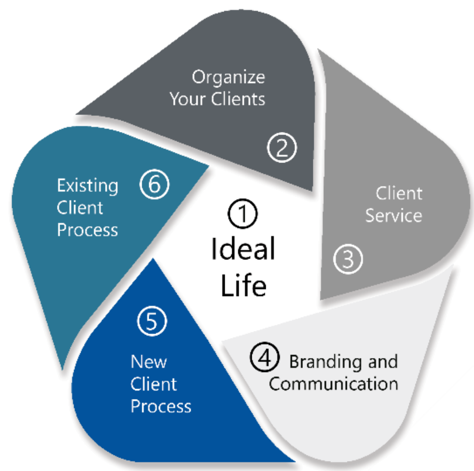
Webinar Series

Total Client Engagement

A First Trust & Pareto Systems Collaboration

To unlock your full potential when it comes to consistent client acquisition and sustainable client retention, you need to dial in a combination of proven strategies that elevate you above competitors. In this 6-part webinar series, supported by Pareto Academy, you will work through an actionable proven process that enables you to quickly and predictably:

- Competitor-Proof Clients
- Gain Their Full Empowerment
- Create Referral-Generating Advocates



WEBINAR SERIES*

Session #1: Gain Clarity on Your Business
Session #2: Organize Your Clients
Session #3: Refine Your Service Model
Session #4: Enhance Your Branding & Communication
Session #5: Fast-Track New Clients to Advocacy
Session #6: Reframe Existing Client Relationships

All webinars are recorded and made available to registered advisors following the live broadcast. Support for access and implementation in Pareto Academy is also available.

Pareto Academy Implementation Dashboard

This process is supported and made actionable by the Pareto Academy, an online virtual coaching application that contains step-by-step resources for implementation. Resources include videos, articles, scripts, agendas, templates and other tools. These actionable, proven and compliant strategies ensure you are not left to your own devices.

DURATION AND TIME COMMITMENT*

Three-month series and approximately 2-3 hours per week for program study and implementation. Sessions are approximately two weeks apart.

**Speak to your First Trust wholesaler to register*

Webinar Series

Schedule and Session Descriptions

Session #1: Gain Clarity on Your Business – Time/Date TBD
Determine what it is you actually want to achieve in life, both professionally and personally, rooted in the belief that you deserve to achieve both liberation and order in a meaningful way. Our process is revealing and will add clarity and intention to your life, which will make future decision-making easier.

Session #2: Organize Your Clients – Time/Date TBD
Create a client classification framework based on assets, attitude and advocacy that will effectively sort and organize your new and existing clients in a meaningful way. This client classification process is the first step in ensuring you and your team focus on the 20% of your clients who generate 80% of your revenue – thereby increasing your chances of attracting more just like them.

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Session #3: Refine Your Service Model – Time/Date TBD
Ensure you and your team deliver ongoing client service with the highest degree of consistency and predictability. Consistency is a fundamental element of trust and overall client satisfaction. Your Advocate Service Matrix will ensure your best clients receive the time and attention they deserve.

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Session #4: Enhance Your Branding & Communication – Time/Date TBD
This session will ensure you are perceived and described as a consultant with a process, rather than as a salesperson trying to close sales. It's not what you say, it's what they hear that matters.
Talk in terms of your ideal client; who you work with, what they want to achieve and how you get them there – and have that message consistent across your entire business.

Session #5: Fast-Track New Clients to Advocacy – Time/Date TBD
Refine, develop and deliver a process for onboarding new clients. This process will ensure consistency for every client you bring on, which is an important aspect of your future referability.

Session #6: Reframe Existing Client Relationships – Time/Date TBD
Refine, develop and deliver a process for reframing with existing clients. This highly structured, client-focused approach will ensure that all of your existing clients are working with you in the true spirit of partnership.

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