

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, join Sherri Palle and Terry Gronbeck-Jones, esteemed Pareto Business Consultants, in this dynamic six-part webinar series.

Winter Series kicks off Tuesday, January 28th, 2025

Supported by Pareto Academy, you will embark on an actionable and proven process that empowers you to:

- Generate consistent & predictable growth
- Elevate the Client Experience to New Heights
- Streamline Efficiency with Systems & Processes

WEBINAR SERIES

Session #1: Gain Clarity on Your Business

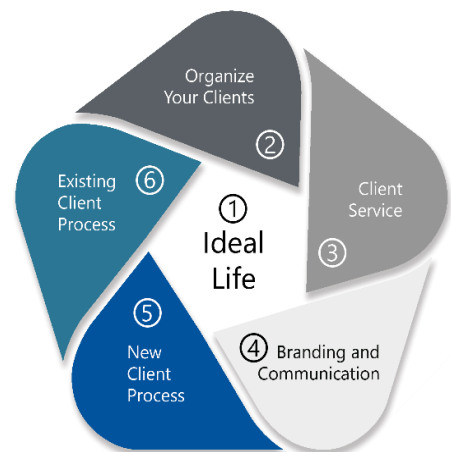
Session #2: Organize Your Clients

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



HOSTED BY

Sherri Palle
Pareto Business Consultant



Terry Gronbeck-Jones
Pareto Business Consultant

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*



TCE Webinar Series

Schedule & Sessions

Session #1, Tues. Jan. 28, 2pm ET: Gain Clarity on Your Business

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, Tues. Feb. 11, 2pm ET: Organize Your Clients

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.

Session #3, Tues. Feb. 25, 2pm ET: Refine Your Service Model

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.

Session #4, Tues. Mar. 11, 2pm ET: Enhance Your Branding & Communication

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, Tues. Mar. 25, 2pm ET: Fast-Track New Clients to Advocacy

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, Tues. April 08, 2pm ET: Reframe Existing Client Relationships

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.

All webinars are recorded and made available following the live broadcast

