



How to Sell Exit Planning Services

Your Critical Path to Engaging Business Owners and Selling Exit Planning and Value Acceleration



How to Sell Exit Planning Services Workshop

Program Summary:

The *How to Sell Exit Planning Services Workshop* is an interactive deep-dive workshop that arms professional advisors with clear techniques and strategic implementations to improve their marketing and sales performance. Attendees will learn methods to effectively engage business owners, strategically position their practice in the market, utilize marketing techniques, and execute proven sales strategies.

Program Curriculum:

MODULE ONE: Creating a Plan for Launching Your Practice

Instructor: [Scott Snider, Vice President, Exit Planning Institute](#)

- Critical Path planning
- Building SMART implementation goals
- 'Next 90 Day' planning for three types of advisors (exercise)

MODULE TWO: Creating Your Results-Driven Marketing Strategy

Instructor: [K. Brooke Norman, VP Marketing, Exit Planning Institute](#)

- Core Concepts, Messaging, and Building Your Ideal Buyer Profile (exercise)
- Filling Your Sales Funnel (Lead Generation)
- 'Rate Your Marketing' Tactics and Success Tips (exercise)

MODULE THREE: Adopting a Successful Selling Process

Instructor: [Scott Snider, Vice President, Exit Planning Institute](#)

- Using a Proven Sales Techniques to Reach Owners & Win Engagements

Pre-Read Materials & Requirements:

No pre-reading materials or advanced preparation is required.

You will be provided digital presentations, worksheets, handouts, three copies of Chris Snider's book for business owners, [Walking to Destiny: 11 Actions an Owner Must Take to Grow Value & Unlock Wealth](#), and an Integrated Marketing Kit for your participation in this interactive workshop.

*Continental breakfast and lunch will be included.

Basic Event Details:

Offered on Friday | Post-CEPA
Workshop 8:00 - 4:00 p.m.

**No CE Credits Offered

Agenda:

Registration & Breakfast
7:00 a.m.—8:00 a.m.

Introduction & Key Goals
8:00 a.m.—8:30 a.m.

Module One:
8:30 a.m.—10:15 a.m.

Morning Break
10:15 a.m.—10:30 a.m.

Module Two:
10:30 a.m.—12:00 p.m.

Hosted Lunch Break
12:00 p.m.—1:00 p.m.

Module Two: (cont.)
1:00 p.m.—2:15 p.m.

Afternoon Break
2:15 p.m.—2:30 p.m.

Module Three:
2:30 p.m.—3:30 p.m.

Final Q&A Takeaways
3:30 p.m.—4:00 p.m.

Locations:

- FEB 16, 2018: Atlanta
- MAY 25, 2018: Chicago
- AUG 10, 2018: San Diego
- OCT 19, 2018: Phoenix
- NOV 16, 2018: Chicago

Onsite Contact:

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