Knockout Virtual Speaking and Training!

Sessions led by Michael Goldberg, CSP

Generate more prospects, more referrals, and more business through our Virtual Speaking and Training Sessions! All virtual sessions will be designed specifically for your attendees. Virtual sessions available as keynote presentations, ongoing trainings, or as a part of a group coaching program.

Sessions may be created to run between 45 and 75 minutes.

Dynamic, high energy sessions with actionable approaches for sales producers and field leaders that can be applied immediately!

KO Approaches to Virtual Networking

Sales producers including financial advisors, brokers, agents, and planners absolutely need a virtual "fight plan" to grow their business. Especially now! Networking, scheduling appointments, developing relationships, generating referrals, making targeted connections, and being massively in service to clients are just as important as ever! Whether you are online or "live", cultivating "knock out" relationships in a virtual world is a must if you are focused on generating more prospects, more referrals, and more business.

KO Approaches to Virtual Recruiting

Field leaders that are focused on growing their team of advisors and sales producers often spend most of their time on the "pitch" rather than developing important communication strategies and their network. For a branch manager, managing partner, or general agent, it is difficult to be in the business of convincing advisors from one firm to leave and come to your firm. Networking and referral marketing is absolutely the best way to leverage social media and virtual meetings to attract more talented advisors to your firm through advocates and referral sources. Learn how to embrace a Networking Mindset and develop a Daily Fight Plan to generate more prospective recruits to your sales team!

The NEW Rules of Networking

Ever go to a public swimming pool? Pool rules are almost always posted to protect everyone and insure a safe swimming experience. Imagine if there were rules posted at every networking event (virtual or live!) you attended including association meetings, conferences, conventions, trade shows, chamber mixers, and community venues. Have no fear! The Rules of Networking are here! Learn the Rules of Networking and how to establish more and better "connections" the next time you attend or host an event.

“Connect” with Your Elevator Speech!

For a first-round knockout! The elevator speech or PEEC Statement (pronounced “peace”) is a great way to describe what you do when networking. PEEC helps you share what you do while making a friendly request – even to those you meet for the first time! Use at virtual events including mixers, conferences, and association meetings. What a great way to connect in all of those Zoom meetings! Practice your PEEC Statement with your natural market, target market, prospects, clients, and referral sources. You just might get a referral!

More Prospects! More Referrals! More Business!

The 1-2-3 punch to growing your business or practice! Referrals are everything. Especially for a financial advisor or agent. But how do you ask the “referral question” without seeming pushy, self-serving, or salesy? How do you get more referrals? How do you get more of the type of referrals you want? What *is* a referral anyway? In this session, we’ll explore the nature of a referral, how to best define a referral, and how to create a daily system to generate more and better referrals through your Daily Fight Plan. Your Daily Fight Plan will be your daily system to keep you focused and help keep your referral pipeline full.

How to Follow Up and Stay in Touch

It’s all about the FU. The Follow Up that is! Nothing great happens without following up. After collecting all those business cards, compiling spreadsheets, posting names into Customer Relationship Management systems, or making connections virtually on LinkedIn, now what? Are those connections prospects? Referral sources? Contacts? Connections? Many financial advisors don’t know what to do with all those names and contact information. Create your preparation, presentation, follow up, and staying in touch strategy to develop and strengthen your network.

Discover, Establish, and Develop Your Target Market

How many financial advisors, brokers, or other types of sales producers have a target market? Many advisors consider small businesses, families, even “anyone” as a target market. The more general your target market is, the more difficult it is to define - making it more difficult to network. Can you define your target market in terms of industry, profession, market segment, niche, dynamic, demographic, and geography? In this session, learn how to discover, establish, and develop your target market (and it’s different for everyone!) so from a networking standpoint you’ll know where you need to go, what you need to say, and who you need to meet.

“Michael has been integral in helping me define my target market and position me better than I have ever experienced in the 16 years I’ve been a financial advisor. As a result of his KO Networking coaching program, I’ve made important connections directly leading to referrals and new business.” **-First VP, Morgan Stanley**

Multiple Sessions – 3-Round Series

Virtual speaking and training programs are available in multiple sessions.

All multi-session programs (each session is a Round!) may be designed as appropriate for attendees.

Each Session or Round is 75-minutes and may be scheduled and delivered to attendees every week or every *other* week as appropriate.

Round One: Rules of Networking, Target Market, LinkedIn

- 6 Reasons and Benefits
- How to Get the Most Value from “3 Rounds”
- 4 Questions – Biggest Challenges / Establish 90-Day Goal Mindset
- Networking Mindset
- 6 Reasons for Networking – there are ONLY 6
- Rules of Networking
- Definition of a Target Market? What *Isn’t* a Target Market
- Why Have a Target Market? / Discover and Develop Yours
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- Implement your Daily Fight Plan/90-Day Goals/Accountability
- Homework Assignment #1

Round Two: Target Marketing, LinkedIn, Communication, and Email

- Review Homework Assignment #1
- Recap Session One
- Decide on Your Target Market
- Elevator Speech and PEEC Statement / Rules
- Developing Your PEEC Statement
- Asking the Right Questions
- LinkedIn Strategies Continued, Email Strategies
- Revisit/Update Daily Fight Plan/90-Day Goals/Accountability
- Homework Assignment #2

Round Three: Virtual Platforms, Referrals, and Phases of Networking

- Review Homework Assignment #2
- Recap Session Two
- A Networking Mindset / Massive Service
- Review PEEC Statement
- How to Generate More Referrals
- Best Practices Virtual Meetings, Networking Meetings
- Social Media, Blogs, Articles, Webinars, and Podcasts
- 4 Phases of Networking / How to Put Process in Place
- Revisit/Update/OWN your Daily Fight Plan/90-Day Goals/Accountability
- Homework Assignment #3

Final Meeting with Group to Discuss and Debrief Next Steps