



The Mind Map Illustrator™ Workshop Overview

Dates

Tue, Sep 13, 2011

Wed, Oct 12, 2011

Tue, Nov 15, 2011

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Practice Reinvention

The workshop goal is to help you immediately focus on applying what you learn in the workshop. Upon returning to your office, you will have a road map to implement your plan to reinvent your firm. Obstacles to implementation will be eliminated. Your staff and partners will readily see the benefit and buy into the process. A hands on practical exercise will clearly help you achieve this goal. You will be implementing the Mind Map Illustrator™ process within a week of your return to the office.

Confidence Builder Techniques

Like any new initiative, confidence is the key to success. Without confidence to enable change, nothing will happen. You will learn five different techniques that we have successfully employed to charge fees for “shadow work.” Very importantly, the practical examples illustrating actual client situations will help you visualize how to approach your clients and prospects. The result will be happy clients who are excited about the new and differentiated value you bring to their lives.

The Mind Map Process

The Mind Map Illustrator™ is a process by which greater value is delivered to your clients through clearer communication and enhanced capabilities. The first phase, The Action Organizer™, is a practical exercise conducted during the workshop that organizes the actions of one of your top “A” clients. 3D Connect™ in phase two will tie your CRM and filing system with your client’s master Mind Map. Finally, The Illustrator Review™ provides a process for conducting periodic reviews with clients, thereby enhancing your relationship. These additional value-added services are centered on your clients and their master Mind Maps.

The Mind Map Library

A Mind Map library of client-centered processes will be provided to you for immediate implementation. The library is organized under the major categories as illustrated in the master Mind Map. In addition, there are Mind Maps available for money management and company operations to help organize your back office. The library is updated continually with new versions provided to advisors on an ongoing basis (annual maintenance program).

The Matrix Builder™

Once you begin using Mind Maps in your firm, mind mapping will catch on very rapidly with your staff. You will be provided with a five-step process to build Mind Maps of your choosing. Templates are provided to make it easy to develop your own Mind Maps to fit how your firm operates. Your staff will become much more efficient as these Mind Map processes are implemented within your firm. You will get back hours of time you currently devote to office and client communication.