

	SECTION 1: Business Model Immersion	Benefit	Advisor Deliverable(s)
Week 1	Keynote presentation on research and business model to cultivate HNW referrals thru strategic business partnerships	Sets baseline understanding of model and approach	Video recording of presentation for repeated viewing <u>Rainmaker</u> Book in PDF
<i>Solo work</i>	<i>Read book, write down 3 questions, email to BVB</i>	<i>Carries momentum of keynote into detail of book and drives questions around anything unclear</i>	<i>Advisors email their top 3 questions to BVB to set agenda for week 2</i>
Week 2	In-depth Q&A on model, presentation and book	Level sets clarity on all key concepts	Video recording of discussion as resource. (Client firm to create intranet folder of content accessible to participants.)
Week 3	COI Closeup: -Understanding the Accountant & Attorney's World -Examples of Economic Glue to set reciprocity equations	Provides clarity to advisors on realities of these professions, how to deliver value to them	Video recording of presentation as resource
Week 4	Building your bench of COI's -Group Session Introduction to COI Analytical Model -Methodology to evaluate COI as referring strategic partner	Advisors are assisted in completing the COI Inventory Worksheet, and then given a clear vision on how to evaluate efficacy of a COI as a referring partner	Video recording of presentation as resource COI Inventory Worksheet completion begun during session
<i>Solo work</i>	<i>Advisor fine tunes their COI Inventory worksheet</i>	<i>Creates an organized bench of COIs to pursue, prioritized by observable advocacy by the COI for the advisor.</i>	<i>COI Inventory Worksheet finalized and emailed to BVB prior to scheduling COI Analysis</i>

	SECTION 2: Individual Advisor COI Analysis, writing of their unique COI business plan and individual reviews	Benefit	Advisor Deliverable(s)
Week 5&6	90 Minute COI Analysis are conducted on an individual basis with the Advisors	Generates a coaching foundation for each advisor, providing a business plan COI by COI	Custom COI Analysis provided to each advisor
Week 7	The Language of Trust: an introduction to the impact of language and dial session research	Provides advisors an understanding of core language principles applicable to clients & COIs	Video recording of presentation as resource
Week 8&9	Individual COI Analysis Reviews	Level sets clarity on all COIs potential and logical next steps	Individual video recording of discussion as resource. Distributed only to participating advisor
Week 10	The Language of Referrals from COIs: leveraging the power of key communication principles to get COI meetings, expand those relationships and increase COI referrals	Gives advisors language principles and verbiage to use in key impact points of finding, growing and harvesting referrals from COIs	Video recording of presentation as resource Action Agenda Worksheet distributed
<i>Solo Work</i>	<i>Advisor completes their action agenda: Who, what & when</i>	<i>Focuses their minds, prompts preparation and gets COI meetings scheduled</i>	<i>Action Agenda Worksheet completed prior to next session</i>
<i>Solo Practice Option</i>	<i>Live COI Discovery practice</i>	<i>Provides live fire experience using discovery process prior to going live with COIs</i>	
Week 11	Functional Introductions: Using the Whole Client to identify live, unaddressed client issues to trigger client introductions that make your COI look good.	Delivers a simple, effective system to engage in an analysis of the COI's clients to identify areas of potential value	<u>The Whole Client Model</u> Book in PDF

	SECTION 3: Iron Sharpens Iron Study Group	Benefit	Advisor Deliverable(s)
Week 14	Group Session: Advisors deliver their action agenda. Which 4 COIs they are targeting, what they need to accomplish and when they are going to do it.	Creates an experience multiplier affect by having each advisor share their challenges and solutions.	Edited transcript as a permanent resource to the Group
Week 18	Advisors share actions, experiences and responses. Group, then BVB, provide feedback and next steps	Force multiplier on experience for the individual by hearing from the entire group	Edited transcript as a permanent resource to the Group
Week 21	Advisors share actions, experiences and responses. Group, then BVB, provide feedback and next steps	Force multiplier on experience for the individual by hearing from the entire group	Edited transcript as a permanent resource to the Group
Week 25	Advisors share actions, experiences and responses. Group, then BVB, provide feedback and next steps	Force multiplier on experience for the individual by hearing from the entire group	Edited transcript as a permanent resource to the Group
Week 28	Advisors share actions, experiences and responses. Group, then BVB, provide feedback and next steps	Force multiplier on experience for the individual by hearing from the entire group	Edited transcript as a permanent resource to the Group
Week 31	Advisors share actions, experiences and responses. Group, then BVB, provide feedback and next steps	Force multiplier on experience for the individual by hearing from the entire group	Edited transcript as a permanent resource to the Group
Week 34	Advisors share actions, experiences and responses. Group, then BVB, provide feedback and next steps	Force multiplier on experience for the individual by hearing from the entire group	Edited transcript as a permanent resource to the Group
Week 37	Final Group Session	Discussion on individual next steps & goals	Offer OGI team as resource for complex cases