

## **Your Road Map to Training that Produces Results**

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### **STEP 1 – Discuss Your Action Plan with Bill Cates**

Using the Academy's *Action Plan* and *Leaders Guide*, we will discuss your culture, your schedule, and best practices of others to determine the best plan for your rollout of the program.

### **STEP 2 – Decide Who to Put Through the Program**

The most important qualities for participants are that they are in a growth mode and willing to extend their comfort zone. This program is a must for new org and any veterans not fulfilling their potential.

### **STEP 3 – Get Your Leadership Team Started with the Lessons**

The success of this program and building a culture of client-acquisition through referrals and personal introductions depends on the buy-in from your full leadership team. You want them using the system in recruiting, so they can become great referral coaches.

### **STEP 4 – Schedule Your Program Kickoff Call with Bill Cates**

Using the Zoom platform (or platform of your choice), Bill will walk everyone through the program, as well as answer any questions related to the content. You can turn this into a mini coaching call to get everyone fired up about what they will be learning.

### **STEP 5 – Start the Training**

Most firms elect to have the participants go through the week's assignment on their own (or with a buddy) and then discuss implementation the following week – as a group (either in person or on a conference call). We've found this to be the most efficient method for training.

### **STEP 6 – Host Your First Coaching Call with Bill Cates**

The best timing for this first coaching call is about 4 weeks into the program – once everyone is exposed to asking for and creating introductions. We allow up to one hour for this call.

### **STEP 7 – Turn on Rapid Fire Referrals (The Habit Maker)**

Once you're near the end of the 60-Day Referral Blitz or Bill Cates has conducted an in-person advance workshop (optional) we will activate Rapid Fire Referrals to keep the message reinforced over a full year. This is when new habits finally get established and your referral culture starts to take hold.