

THE FOUNDATION AGENDA



WEEK 1: THE RIGHT CHAIR

Often everyone does a little of everything. Together we evaluate your team, the flow of the office and job responsibilities. We adjust accordingly and create motivation that works for your team - a real vacation schedule, set reviews, and benefits that are fair to you and them. Don't have an assistant? Perfect for the solo-preneur too.



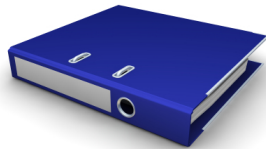
WEEK 2: THE FRONT STAGE

Advisors work best when selling and being on the front stage. You'll learn how to free yourself from your back-office and empower your staff to just "handle-it" so you don't have to think about it.



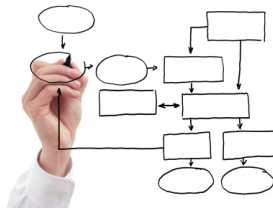
WEEK 3: MANIC MONDAYS

Ever feel like everyone's going in different directions without getting the results? Let's get everyone on the same page and set the stage for the upcoming week. You'll get all the tools and guidance to make your meetings a success!



WEEK 4: PROCEDURES MANUAL

The Bible of your office! Everything from answering your phones, to processing checks, to drip marketing pieces for your existing database. We'll create your customized manual with our template. Fast, easy and headache free!



WEEK 5: ONE PAGE BUSINESS PLAN

This will not be your run-of-the-mill business plan that takes 321 days to create. All you need to know -- where you're going, why you're going, and what you need to do. Get it, got it, good.



WEEK 6: DATABASE REHAB

An accurate, up-to-date, categorized database that makes marketing, events and mailers a breeze! We don't endorse one program just functionality.



WEEK 7: STOP THE INSANITY

How to balance your calendar with specific activities for specific days -- sales, thoughts, activities and fun! Everyone's life becomes more enjoyable -- including your spouse's and staff's.



WEEK 8: EFFICIENT & ORGANIZED

Your team will learn how to maintain and run a phenomenal office that works like a finely oiled machine. No more out-of-date applications, expired licenses and disorganized servers!



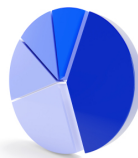
WEEK 9: COMPLIANCE

Do you know what's really required to be compliant? How about what needs to happen for your office to be paperless AND compliant? We'll cover it all so compliance is more than just an annual visit.



WEEK 10: THE PRE-APPOINTMENT

You and your team will get clear on what gets mailed to prospects and clients in preparation of an upcoming appointment. You'll create your own customized appointment process that clearly defines every step from A to Z.



WEEK 11: THE APPOINTMENT

You'll learn how to gather ALL of your client's information in advance, how to organize it effectively so they understand it, and what tools to use to make sure you close the sale.



WEEK 12: GETTING PAID

None of this matters if you aren't getting paid quickly and efficiently. We'll work with your assistant to show them how to properly submit applications, complete transfer forms and deliver the policies once they issue. Plus, your clients with pending cases will begin hearing from your office weekly -- we'll cover that too!

READY? LET'S GO

JOIN TODAY - THREE GREAT OPTIONS TO GROW YOUR BUSINESS

Name

Company

Phone

Fax

Email

Billing Address

City

State

Zip

Payment Method (circle one) Visa MC American Express

Credit Card Number

Expiration Date

CVC Code (3 digits on back)

Signature

Date



A FEW THINGS TO EXPECT AT THE END OF 90 DAYS...

1. Clearly defined procedures that run your office so you don't have to.
2. An improved and better relationship with your team.
3. Faster processing times for your pending business.
4. An organized database that runs your marketing programs to existing prospects and clients.
5. Conversations with only your best clients (while someone else handles your less-than-ideal clients).
6. Freedom from your back-office headaches.
7. Happy staff and a cohesive vision of the future.
8. A calendar that is full and balanced.
9. An appointment process that everyone follows and understands - including your clients
10. More balance and less stress at home and in the office.

So don't delay - your future company and vision awaits!

OPTION 1

FREE CONSULTATION

Not sure if you can really use a service like this? Start here! We'll schedule a convenient teleconference for us to discuss your practice.

Investment *YOUR TIME*

OPTION 2

(3) PAYMENTS

Great option for offices just getting started or wanting some flexibility with their payments.

Investment 3 Payments of \$950 each

OPTION 3

ONE-TIME DISCOUNTED PAYMENT

Ready to get started today and receive a discount? Then this option's for you.

Investment One Payment of \$2,400

JOIN BY CLICKING HERE [HTTPS://WWW.GETTINGYOUINTHEGROOVE.COM/PUBLIC/5.CFM](https://www.gettingyouinthegroove.com/public/5.cfm)

OR FAX TO 866-673-4465

YOU WILL BE PERSONALLY CONTACTED WITHIN 24 HOURS.