

PLAN 2: "Becoming a Firm of Distinction"

365-Day Business Assessment and Marketing to the Affluent & Wealthy Mastermind

This plan is designed to fully re-engineer your practice to build efficiency and effectiveness at every level. Virtually every facet of your practice and the process are reviewed and proven strategies and tactics tendered as issues are uncovered. Like our **Coaching Plan 1**, we begin this process with a discovery call with you, Richard Weylman and your Personal Coach to frame the outcomes desired. In addition, your entire team is required to participate in all coaching activities, including attend the retreat (outlined below) and be engaged on all coaching calls. This plan will have a profound impact on your short and long-term success.

This 365-day coaching model includes:

1. A weekend marketing retreat beginning on a Friday at 4:00 PM, continuing all day Saturday and concluding Sunday at noon. This retreat will be held in Tampa, Florida with Richard Weylman, your entire team including staff, and a Certified Marketing Coach from Richard's team that he will assign to you.

The retreat agenda in brief is as follows:

A. Friday Evening:

Meet, greet, define your expectations and expanded vision, codify issues

B. All Day Saturday:

- i. Evaluate and assess current marketing versus merchandising mindset
- ii. Determine cultural/social differences
- iii. Increase understanding of the wealthy and their expectations
- iv. Determine the unique value proposition your team delivers to the marketplace
- v. Define your service platform
- vi. Identify optimum market opportunities
- vii. Initial 90-Day Marketing Plan development with Richard Weylman and your Personal Marketing Coach for execution and transition into a distinctive firm in your community.

In addition:

2. Pre-retreat: We then will send every member of your team a pre-coaching questionnaire to capture detailed insight into your practice. This is followed by a 1-hour strategy call with you, your entire support team and Richard with your Certified Coach.

3. Six (6) strategy calls with Richard Weylman throughout the life of the plan.

4. A series of 22 one-hour call sessions throughout the life of the plan with your Personal Marketing Coach for ongoing strategic and tactical support.
5. Your entire team receives an annual online subscription to The Weylman Center for Excellence in Practice Management™. This provides you access to 41 marketing and service elevation classes many of which you and your team will be required to complete during the coaching term.
6. Development, execution and support of each of your five sequential 90-day marketing plans.
7. A review by Richard Weylman and your Personal Marketing Coach of your 90-day marketing plans for clarity, congruency and ability to achieve objectives prior to execution, along with written recommendations, suggestions, ideas and insights.

The time line of coaching sessions:

Week 1. A one-hour pre-retreat discovery and strategy call with Richard Weylman and one of Richard's certified coaches who is assigned to be your Personal Marketing Coach.

Week 3. A weekend meeting: Friday evening until Sunday at noon in Tampa, Florida with Richard Weylman and your Personal Marketing Coach as well as members of Richard Weylman's leadership team. Your entire team including direct client support persons and staff must attend.

Week 4. A one-hour tactical call session with your Personal Marketing Coach to finalize the development of an initial 90-day marketing plan.

Week 6. A second one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 8. A third one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 9. A fourth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 11. A fifth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 13. A sixth one-hour call with Richard Weylman and your Personal Marketing Coach to identify execution gaps and strategies for your second 90-day marketing plan.

Week 15. A seventh one-hour strategic and tactical support call session with your Personal Marketing Coach to address second 90-day marketing plan execution tactics and accountability.

Week 17. An eighth one-hour tactical call session with your Personal Marketing Coach to finalize the development of your second 90-day marketing plan.

Week 19. A ninth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 21. A tenth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 23. An eleventh one-hour tactical call session with your Personal Marketing Coach to finalize the development of your third 90-day marketing plan.

Week 25. A twelfth one-hour call with Richard Weylman and your Personal Marketing Coach to identify execution gaps and strategies for third 90-day marketing plan.

Week 27. A thirteenth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 28. A fourteenth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 32. A fifteenth one-hour strategic and tactical support call session with your Personal Marketing Coach to address 90-day marketing plan execution tactics and accountability.

Week 36. A sixteenth one-hour check-call with your Personal Marketing Coach to ensure development and progress of your fourth comprehensive 90-day plan.

Week 37. A seventeenth one-hour call with Richard Weylman and your Personal Marketing Coach to identify execution gaps and strategies for third 90-day marketing plan.

Week 39. An eighteenth one (1) hour execution and gap call with Personal Marketing Coach to ensure progress of your fourth 90-day plan.

Week 44. A nineteenth one (1) hour tactical support call with Personal Marketing Coach to ensure progress of your fourth 90-day plan.

Week 48. A twentieth one (1) hour tactical support call with Personal Marketing Coach to ensure progress of your fourth 90-day plan.

Week 49. A twenty-first one-hour call with Richard Weylman and your Personal Marketing Coach to identify execution gaps and strategies for fourth 90-day marketing plan.

Week 51. A twenty-second and final check-call with Richard Weylman and Personal Marketing Coach to ensure success.

365-Day “Becoming a Firm of Distinction” Coaching Summary

- Full weekend: Business Discovery and Planning Retreat with Richard Weylman, his staff and your Personal Marketing Coach.
- Six ongoing strategy and support calls with Richard Weylman.
- Development of four comprehensive and sequential 90-day marketing plans.
- Personal reviews by Richard Weylman and your Personal Marketing Coach of each of your four (4) marketing plans.
- Twenty-two tactical support calls with your Personal Marketing Coach.
- Full access to The Weylman Center for Excellence in Practice Management™ curriculum and support center for the life of the plan.

Plan 2 Tuition - \$45,000

Tuition shall be paid in three (3) payments, payable as follows: (1) \$25,000 with a signed agreement, (2) \$10,000 at end of week 12, (3) \$10,000 at end of week 18.

Note:

We would expect any individual or team who is participating in this coaching process to set high expectations for and receive a significant business increase. However, even a modest 10% increase for most will cover the entire investment for this comprehensive coaching model. So, determine your expectations and compute it against your income.

We require all staff to participate in our coaching in our coaching plans as the success of your practice is an integrated process amongst your entire team.

[Please complete an Inquiry Form to discuss your Coaching Requirements.](#)