Coach Advisors To Succeed

Program Catalogue

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HOSTICK CONSULTING SERVICES INC.

An inventory of proven coaching programs which enable advisors to elevate their performance and meet their expectations.

These coaching programs are designed to be used by advisors and their coaches for:

- *Advisor Self-Coaching*
- *Group Coaching*
- *One-On-One Coaching*

Program Details

- Each program is educational and covers a strategy for success
- The implementation for each advisor to personalize the knowledge is covered in an interactive workbook for each program
- Programs can be grouped to build courses which apply to segmented advisors and groups to achieve growth and development
- Programs labelled 'A' have a presentation. Programs labelled with a 'B' have a workbook personalized to the program
- Can be held live or virtually
- Minimum time for each program is one hour

Here is an overview of all Advisor Success programs:

Create A Mindset for Success

It all starts with how you think. Learn how great advisors think and how they follow the key principles that will enable you to succeed. Your attitude will carve out the path to success that you will enjoy.

Building A Value Proposition

Learn how to position what you do and to build a brand in the marketplace. You need to know how you will be competing and winning against the competition and how you win. You will learn how to leverage your distribution and personal strengths to your prospects and customers.

Time Management for Advisors

The role of an advisor is very challenging and will require many elements to be integrated into your life. That requires careful time planning but must include all elements of your personal and business life. You will learn how to make this happen through learning how to use your time effectively to deliver value in all the four key areas of your life.

How To Ensure Longevity Of A Financial Advisor

This program highlights the key elements that a financial advisor will need to execute to survive long term as an advisor.

Plan for This Year

This presentation will help you walk through how to build a plan annually for your business.

Practice Management Program for Advisors

This is a complete program for advisors to personalize how their program for client management and sales is effectively handled.

Prospecting Basics

You will learn the fundamentals of how to prospect for new clients which is necessary for you to grow your business. All practices need to grow by acquiring new clients to your base and to replace any customers lost through attrition. If you are a great prospector, you can only succeed.

Referred Lead Prospecting

This is the most effective way to grow your practice. Learn how to master the art of getting people to refer you. You can build a roster of centres of influence who will provide an ongoing tap of quality referrals for you to work with.

Prospecting Generator

Learn how to build lists of people to call on using a tool for you to think your way to finding great prospects. You will find out how to find people through identifying what they might want or by what they do in life.

PROGRAM DETAILS

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Call Reluctance

Learn how to position what you do so that you do not have reluctance to talk to any-body. You will learn to see how you perform and how to improve so that you will have no boundaries to growth but rather will continue to develop into a master of connect -ability.

The Sales Process

Learn what a great sales process looks like and how you succeed if you follow it consistently as you grow the number of clients that you deal with. You will learn how this will not only improve your closing ratios but also be the key to your growth with unlimited referrals.

The Planning Process

You will learn how to follow a process with your customer when meeting them, gathering information, providing solutions and integrating them into your practice. This will also enhance your compliance regime.

Customer Buying Process

An outline of how customers buy.

The Insurance Story

Learn how insurance works for your customers. They need to understand all types of insurance so they can build a plan for their own needs. A careful look will solidify your relationship and create a roadmap for you to navigate them as they grow through life's changes and challenges.

Close The Sale

This program will review a number of strategies which you can use to motivate a prospect to action.

Objections For Life Insurance

This program will cover a number of common objections to the purchase of insurance products and how to handle them so the sale will be made.

Unstoppable You

This program will review how to establish and retain the self confidence you will need in order to overcome challenging situations as you execute on the strategy which will enable you to win in the marketplace.

Getting Out Of A Sales Plateau

It is normal for advisor performance to plateau at various times in your career. You will learn various strategies on how to execute breaking out of a plateau and returning to a growth mindset.

What Advisors Need To Be Successful

You will learn the key tools, partnerships, and education that advisors need to master if they are to win in the marketplace. Leveraging your suppliers, partners and peers are very important components of your success.

What Motivates Advisors

It is all about understanding how great advisors drive their behaviour in a continuous fashion. This drive for results seems endless and will enable you to want to learn more, enter new markets and build a sustainable pattern of growth.

Characteristics of Winning Advisors

There are many characteristics that successful advisors possess. This will help you onboard, train and coach them to performance success.

Winning Strategies Advisors Should Consider

Learn about 25 of the greatest strategies being used today by top advisors as they provide a foundation for growth. You will learn what they do and how to choose the ones that you feel will be most important for your success.

Client Segmentation Model for Advisors

Learn how to grow your team using the principles that successful recruiters in the marketplace apply and succeed with.

Steps to Selecting and Grooming a Successor

This program will provide an overview of things that you need to consider when you are considering someone to take over the responsibility of looking after your practice.

Selling An Insurance Practice

This program will review the highlights of what you need to think about and stratagize when preparing for and executing the sale of your insurance practice.

The Value of a Financial Practice

There are many elements to the value of a financial practice, this program will review what you need to consider when coming up with a valuation of what you own.

About Dan Hostick

Dan graduated with a B. Comm from McMaster University in 1971. He was very involved on campus with several organizations. He was a varsity hockey player for four years and was selected Captain of the hockey team in his final year. Dan immediately went into the insurance industry with London Life as a leading advisor, head office trainer and field regional director. His career was very accomplished as a field leader spanning 35 years with three large insurance companies. He achieved his CLU CHFC and CFP designations.

Upon retirement from his distinguished career as an advisor and field leader he has spent over the last decade consulting and coaching distribution organizations and advisors to success. He also was a partner in building software for coaches. Dan writes and delivers training programs designed to help advisors succeed and realize their potential. Many advisors and coaches have been participants in his training programs and enjoyed the benefits of these strategies.

Dan is committed to helping everyone he works with by sharing his over 50 years of experience appropriately and successfully.

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