Success Training Workshops

Facilitator Notes

Workshop Topics
1. Quickstart to Using Your App
2. Importing a New Contact
3. Pre-written Messages, Categories and Resources
4. Your Digital Business Card
5. Pre-written & Personalized Email Campaigns
6. Understanding the Metrics; Statistics & the Brag Button
7. Using Personal Resources & Calendar Invites
8. Posting Surveys on Social; Generating More Leads
9. Prospecting Wizard
10. Using the Task Feature
11. Label Feature With Broadcast Email
12. Hot List & Activity Log; Statistics
13. Contests & Leaderboards
14. Built-in Coaching & Group Codes
15. Filters, Search, Labels & Notes
16. Navigating your Web Application / Desktop
17. The 4 Disciplines of Execution
18. ASK ME ANYTHING

Topic: Quickstart to Using Your App

TRAINING POINTS:

You have to use your discretion on what to focus on for each company. The goal is to sell the value of the platform as a whole and why driving the TW will change their future.

The best builders drive systems, processes, and personal growth.

Your desire to help users prospect and follow up more effectively and to drive this culture in their organization will help them to win.

Touch on all the App's features. However, focus on the value of attending and how this tool will help them to recruit effectively. Recruits want more than anything to know they can do it.

Know their lingo. It matters. Make sure you know the company name, leader name, distributors, reps, agents, associates, etc.

TRAINER CONTENT POINTS (SOLUTION):

- Understanding and navigating your home screen
- Identify the quantity and quality of exposures
- Resources, campaigns, stats, contests and coaching
- Where to find support and settings
- The 'hot' prospect algorithm

Topic: Importing a New Contact

Having a database that belongs to you.

Prospects are all labeled.

Are you a professional networker or an amateur? Never forget a leader with a 6k-person database, 1 email and 3 recruits. Was everyone supposed to invest in Constant Contact and write campaigns to succeed?

Talk about the multiple ways to generate contacts: QR codes, import from a phone, import from social using forms

Ways to organize your contacts: adding searchable notes, labeling contacts, contact journey, educating on the rating system — all part of adding a contact properly

CSV file is an option but here's the catch…

You must educate them on the difference between a contact vs. exposure vs. engagement

Topic: Pre-written Messages, Categories & Resources

- The focus last week was to add a contact. This week is where the rubber meets the road.
- Teach distributors exactly what resources they should use to make an exposure. How to make an exposure is key.
- Remember our goal is to increase activity, not just knowledge.
- Explain why driving the lead measure is the most important.
- The quantity and quality of the exposures are paramount. Their success depends on it.

CHALLENGES:

- Digital noise is killing authenticity
- Lack of time in the day for follow-ups
- Not knowing the priority of your prospects

SOLUTIONS:

- 1st pique, 2nd present, 3rd follow up
- The Authentic Sharing Technology (AST) difference and not hiding behind technology
- Philosophy, structure, and execution
- How to use personal resources
    - Why prospecting matters
    - What to send next and what to say

NEXT TOPIC: Build for next week's call: your digital biz card with Calendly links, referral pages, social feeds, and QR codes.

A person could easily pay $50 per month for this feature alone. It's built-in. Next week we will show you exactly how to personalize it.

Topic: Your Digital Business Card

Paint the picture of how powerful having your own digital biz card is and how it's fully customizable.

- 10 personal links - referral pages, Calendly links, personalized hub sites
- All your social channels
- QR code for raffles

CHALLENGE:

- We always have our phones. Making connections should be a top priority
- Being at an event and asking for a phone number and email. Fat fingering etc. is often time-consuming and uncomfortable
- Paper cards are not working. The habit of the receiver has changed. The world has moved on.
  - These are all really important challenges. Drill down on the pain points that exist in the modern age.
  - Some of these are brought on by technology and are not designed for generating and building relationships

TRAINER CONTENT POINTS: Ready to harness the power of referrals?
Add a referral page to your digital business card!

- Could we show a digital biz card on the slide with arrows pointing and show how it is searchable?
- Including Calendly or scheduling links
- How to run a raffle at a live event and use your QR code and raffle button

Topic: Pre-written & Personalized Email Campaigns

EMAIL CAMPAIGNS:

- Incredibly powerful. Email is growing. The way it is being used has changed.
- Lots of people think email is dead but the stats tell a very different story. You should sell this concept.
- Paint a picture of how leverage and duplication mean that your team could literally have tens of thousands of contacts in a long-tail strategy approach.

CHALLENGE:

- Email opt-in rates = 3 percent or less
- Auto-responders are inauthentic
- Too many qualified prospects fall through the cracks

Topic: Understanding the Metrics, Statistics & Brag Button

UNDERSTANDING YOUR STATS:

- Holding yourself and your team accountable in a positive and encouraging way is the focus of this training.
  - Networking is not the military.
    - Demanding, expecting, manipulating vs. inspiring, encouraging and recognizing your team.
  - Using exposures and engagements. This is all about identifying where you spend your personal time. Awareness: where does your team spend its time?
    - In order to identify and support the most active people on your team you must know who they are.
    - Statistics allow you to inspect what you expect. You cannot manage what you cannot measure.
    - Working will people simply because you think or they tell you they are working hard is not a solution. Or because you relate to them.
- Engagement stats and brag buttons are powerful tools when used correctly.
- This training is an opportunity to coach on the power and importance of inspecting what you expect. No one else in the industry has this tool.
- It is a modern-day tracking sheet.
- Hard to tell who you should really be working with and the stats change the game. The shallow brook runs the loudest, meaning big talk is not always accurate. Leaderboards and contests and training partner features.
- Training #12: we will talk more about activity logs and hot prospects. This training is about overall stats and leading your team.
- Sell the vision of why this is so important.

CHALLENGE:

- I tell a very specific story about one of the best recruiters in Rodan and Fields. She was incredible at making exposures and terrible at follow-up. Knowing who was interested changed her into someone who was incredible at follow-up.
- We all have exactly 24 hours per day and how we use them is what matters the most. Where do you spend your time? Leading your team, investing in proper personal activity and helping your team do the same. Prospecting, follow-up, sales and recruiting.

SOLUTION:

- CTA: What is your personal goal between now and next week? Will you commit? Put it into the chat.
- Ranking stats against others in your space
- Driving culture through the "brag" button
- Commitment to a number

APP DEMO:
FOCUS:
- Explain exactly, slowly, like it's the 3rd grade, what a contact (meaningless) and exposure (effort) and engagements (quality) are — this is important.
- Reiterate 4DX (4 Disciplines of Execution) which we will train on in TW #18. The lead measure is what matters and it's what we should all measure
- Tell stories. If you don't have any, tell Patrick's story. What do high exposure and low engagement mean? Low exposure and high engagement?
- Be encouraged by the data. Nobody wants a boss. Building a voluntary army is more voluntary than the army.
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Call to Action (CTA) Ideas or this week's Challenge:
Understanding
- Have everyone go to the statistics screen and send a screenshot to themselves using the brag button. Post it to their team's social page right now and ask what is your commitment next week.
- Type that into the chat window of Zoom right now. Document of few of the people who committed and open next week's call by recognizing the result. Ask for people to commit to a number they can manage.
- Ideally, run a contest.
  - We will add a resource to everyone who hits a certain number.
  - We could run a contest for everyone who does this workshop. We launch a recognition board for everyone who does 5 this week and they get the BTG workbook or something.

NEXT TOPIC: PERSONAL RESOURCES & CALENDAR INVITES FEATURE
It's easy to get people excited about this feature. Being able to have your own trackable links and calendar invites is huge.

Topic: Using Personal Resources & Calendar Invites

Using Personal Resources

- Focus: show the user how they can use a personal resource feature to share any link they wish and be able to track when the prospect views the information
- Same for calendar invites. Give them specific examples of how setting up your own invites and resources can be done

APP DEMO:

Focus**:**

- Show exactly how to go to a link on your phone with the share button and how it will automatically pull the link into resources.
- Give an example of links they might use. Calendly for 15 min or 45 min apt. 3rd party articles, videos or Google forms. Enrolment pages or company resources
- Show how to create their own pre-written message in front of a resource, especially a company resource.
- Remind them when sending via text you must have 2-way communication first or the link will be disabled or not sent at all.

Call to Action (CTA) Ideas or this week's Challenge:
- Create a personal event right now and share it with someone
- Go to the webpage and show how easy it is to pull a link into your App

Topic: Posting Surveys on Social

- This is a really powerful training to show people how they can post content directly to social media and not through contacts.
- Qualified because they filled out a problem-aware survey. It's critical that you explain what a problem-aware survey is and how it works. Not solution-aware or productaware, but problem-aware.
- Also, generating a lead on social is you using social but not being used by it. If you stay on social and don't pull the contact info out of social, you end up being leveraged by social platforms.
- Remember to tell stories. Gig economy survey and Lawrence generated 300 leads posting a survey to social 1 time, another 500 surveys completed by sending the survey directly to prospects. 90% + completed the survey. How would you like to generate 800 completed surveys in less than 3 weeks?

SOLUTIONS:
Generating leads using surveys via social media
- Great conversation starter - used in 2 ways = resource to a specific contact and resource direct to social (explain the difference)
- Must teach this to your team. Won't happen by itself.
- Pre-written messages combined with surveys is a great 1 - 2 combo when sending to a contact
- This training is primarily how to post to social - share stories with specific details. Stories sell, facts tell.
- Why problem aware VS. solution or product aware
- Bein interested is more important than interesting - questions are a window to a person's soul.
- Where to find the results
- How to interpret the results and what to do next

Call to Action (CTA) Ideas or this week's Challenge:
- Use social media. Don't let it use you.
  - Challenge: Post a survey with a thoughtful message on social media in the next 24 hours.
- Ask people to post a survey directly to Facebook while you are on the call with them. See if they can generate a lead. Explain the more active on social you are, the better this will work. Facebook algorithm does not push to your whole list. Explain why.
- If you really want to go all out, you could generate a 1 week contest linked directly to the survey and promote a contest for the 1 week with some form of recognition for everyone who generated 5 engagements.

Topic: Prospecting Wizard

The main purpose of this feature may not be what many people think. It is NOT primarily a way for you to make exposures. It's a way for any leader in the organization to show multiple people in one location (5 people at a coffee shop, 50 on a Zoom or 500 at a live training) how to make 5 exposures in less than 5 minutes.

Call to Action (CTA) Ideas or this weeks Challenge:
Challenge: Use the wizard to add and expose 5 new contacts within the next 24 hours.

Topic: Using the Tasks Feature

Call to Action (CTA) Ideas or this weeks Challenge:

- Tasks! What's next?
    a. Challenge: Identify income-producing (lead measure) activities you can do with 3 prospects and set them up as tasks tonight.

Topic: Label Feature, with Broadcast Email

Remember to refer back and promote slide deck #5 (Campaign Emails) so users know how to activate this feature

CHALLENGE:
Not having a CRM and Email broadcast platform in one place
- ■ CRM's are bloated and expensive and rarely mobile first.
- ■ Platforms owning your contacts info is EGREGIOUS!
    - ● Definition Egregious: *outstandingly bad; glaring; flagrant*

Call to Action (CTA) Ideas or this week's Challenge:

- ● Put a label on it:
    - ○ Challenge: Check how many you have opted in to an email campaign. If fewer than 10, identify which contacts you will reach out to to get them opted in to unlock broadcast feature. If more than 10, write out a prospecting email and broadcast it.
- ● Why use label feature
- ● Best way to create a label
- ● Using Broadcast Emails
- ● Unlocking this incredible feature
- ● Finding great content and matching it to your Labels
- ● Email marketing tools are expensive
- ● Rules: 5 opt-ins and 10% opt in rate
- ● Filter and email by a variety of methods, recency, Gmail, labels, by the current campaign they are in

Topic: Hot List & Activity Log; Statistics

CHALLENGE:
- I never know who my hottest prospects are
- Not following up because I don't want to bug them
- Not knowing if my prospect really reviewed the information

SOLUTION:
- 5* Manual Rating system
- The Algorithm! 75% of the score
- Activity Log - 1st activity of the day

Call to Action (CTA) Ideas or this week's Challenge:

- Who do I call next?
  - Challenge: Use the hot prospects algorithm to identify 3 prospects you will follow up within the next 24 hours. Then plan how you will execute on the follow-ups.

Topic: Contests & Leaderboards

CHALLENGE:

- Important to remind people that these are activity-based and why activity is critical to sales and recruiting

Call to Action (CTA) Ideas or this weeks Challenge:

- Sometimes it's not just about the money.
  - Challenge: Become part of an accountability group with your upline and/or start your own accountability group with hungry people on your team so everyone can show their weekly exposures and engagements.

Topic: Built-in Coaching

Call to Action (CTA) Ideas or this week's Challenge:

- Everyone needs a coach.
  - Challenge: Identify 2 trainings in the coaching section that you will review in the next 48 hours.

Topic: Filters, Search, Labels & Notes

Call to Action (CTA) Ideas or this week's Challenge:

- Organizing your contacts
  - Challenge: Use the star rating, algorithm score, notes, tasks, campaign, or contact journey to identify 3 prospects you will follow up with in the next 24 hours and how you will go about doing it.

Topic: Navigating your Web Application / Desktop

Call to Action (CTA) Ideas or this week's Challenge:

- Navigating your web app/desktop
  - Challenge: Play around with the web App to get familiar with it and then send a prospecting broadcast email.

Topic: 4 Disciplines of Execution

SOLUTION:
Identify "Wildly Important Goal" Workshop -

- ■ Do you know what your lead measure is? And why does it matter?
- ■ Can't manage what you can't measure. Learn how to lead and hold team accountable
- ■ App works in accordance with The 4 Disciplines of Execution formula

TRAINER CONTENT POINTS:
Identify "Wildly Important Goal" Workshop -

- ■ Do you know what your lead measure is? And why does it matter?
- ■ Can't manage what you can't measure. Learn how to lead and hold team accountable
- ■ App works in accordance with The 4 Disciplines of Execution formula

Call to Action (CTA) Ideas or this week's Challenge:

- ● Staying focused in the whirlwind
  - ○ Challenge: Decide how many exposures you will commit to daily and do that many by the end of the day today.

Topic: Ask Me Anything

Call to Action (CTA) Ideas or this week's Challenge:

- Ask me anything.
    - Challenge: Trainer, get creative… what do you need to challenge THIS audience to do? Challenge them!