DYNAMIC DIRECTIONS

A BETTER LIFE AND PRACTICE

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TECHNOLOGY GROUP COACHING FORMAT

Pre-work:

- Complete Technology Assessment and goal setting sheet
- Identify areas of interest for month 12

Note:

- Advisor and staff champions will join various months for select topics.

Month 1: • Box o File Structure o CRM Integration o Document Sharing	**Month 2:** • E-Meeting Part 1 o Introduction to E-Meeting o Meeting Prep-Workflow o Basic presentation Skills o Saving Documentation and Sharing with Client	**Month 3:** • E-Meeting Part 2 o Integrating Managed Account Reviews o Customizing E-Meeting for your practice
Month 4: • E-Meeting Part 3 o Integrating E-Meeting as a Financial Plan Deliverable	**Month 5:** • E-Meeting Part 4 o Developing Effective E-Meeting Presentation Skills	**Month 6:** • Salesforce Part 1 o Basic Navigation o Calendar Management o Client Segmentation o Task Management
Month 7: • Salesforce Part 2 o Report Writing o Dashboard Construction	**Month 8:** • Salesforce Part 3 o Using Reports to track practice o Opportunity tracking and follow-up	**Month 9:** • Salesforce Part 4 o Using Client Insights to Drive Results o Automating Marketing on Demand
Month 10: • Salesforce Part 5 o Creating Action Plan Templates to automate practice procedures o Using E-Mail Templates to automate communications	**Month 11:** • Client On-Line Experience o Using Glance to increase client use of Ameriprise Website o Developing 3rd Party Secure Sharing of Client data with Clients' other Advisors	**Month 12:** • Topic of interest requested by the group

Space is limited - contact us to learn more and sign up today!

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