



OFFICIAL ITINERARY

DAY 1 - YOUR MINDSET TO SUCCESS

8AM - BREAKFAST

The Client Experience

Craig Hersch first published on this subject in Trusts & Estates Magazine. In a commoditized world, your clients expect a transaction when you intend to create a valuable experience. Consequently, the client fee expectation is often much lower than your intended charge for your services. What steps must you take to bridge the experience gap before and during the time of engagement?

Front/Back Stage Systems and Client Value Creation

What will clients pay a premium for? In this session we discuss how consistent systems and processes are crucial to creating client value, comparing transactional versus experience economy models. We also define the three elements of client value, and how that applies to your estate planning practice.

Overcoming Rugged Individualism

Leading an estate planning law practice from its inception requires being comfortable with risk and a “do-it-yourself” spirit, or “rugged individualism.” That mindset allows you to thrive...in the early years of your practice. Eventually you reach a ceiling, requiring you to find multipliers, and more importantly, letting go to enlist them. Three statements identify you as a rugged individualist. What are they? Techniques to break-through to the next level addressed.

APPROX. NOON - LUNCH SERVED

Successful Initial Client Interview

An initial interview is much more than signing an engagement letter, nor is it all about socially connecting with the client, although these two items are important. It's vital that two goals are accomplished – you want your client to see the unique value that your firm will create for him or her, with the implied understanding that they can't find the same services anywhere else for any price. We'll demonstrate how to differentiate your practice from the competition.

Focus, Not Frustrated

A very real danger with taking your practice to higher levels is the feeling that you'll never get to the top of that mountain. Guess what? You won't! Because once you summit, you'll have your sights set on another, higher mountain. Constantly looking for that higher summit can be emotionally draining and sap your energy, and that of your team. As Colorado hikers know, “every now and then, turn around, because that's where the view is.”

Key Takeaways and Action Plan

We provide thinking tools to record your key takeaways as they occur during our sessions to create an action plan when you return to your office. Before we break for the day to enjoy dinner together, we ask you to share one key takeaway with everyone that you plan to implement into your practice.

**AFTER DAY 1 - PLEASE JOIN US FOR DINNER
AT A LOCAL RESTAURANT**



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DAY 2- TRANSFORMING YOUR PRACTICE

8AM - BREAKFAST

Right Fit Team Members

You never know who you hired until they start working for you, right? This bromide isn't true with today's online tools available to your practice. Maria Reimer, a Kolbe* certified specialist, will walk you through how personal assessment tests can be used to fit team members, even existing ones, into positions where they will thrive. We'll also review the Freedom Practice® Team Tools Kit, which sets up each team member for success from the onset of employment through annual reviews.

Marketing Avatar & Niche

To develop classy marketing geared toward your A+ client, you must first describe, in great detail, the physical, emotional, socio-economic and demographic attributes of that client. Your outreach efforts towards "anyone who needs estate planning" will not succeed, as they won't speak to the needs and emotions of your specific niche. This deep dive provides you clear direction to put together influential, persuasive, educational materials your prospects will look for.

Overcoming Objections to Trust Administration Services

Wasn't probate avoidance the selling point of a trust? After your client's death, how do you engage the client's spouse or children as trustee/executor/personal representative who believe that because client had a trust, there is nothing to do other than distribute assets? In this session we will review how a consistently applied, well considered Front/Back Stage system can take your probate and trust administration practice to the next level.

APPROX. NOON - LUNCH SERVED

Client Care Program

Whether you call it annual maintenance or client care, the benefits to these programs are enormous. We review the different types of programs that you might incorporate into your practice, along with the advantages and disadvantages to each. Aside from annuitizing your client base, a great program forms a unique community differentiating your firm in the marketplace. We learned in yesterday's session that systemic client value creation drives your success – how will that shape your program from its inception and going forward?

No/Low-Cost Technology

It is frustrating when a client calls because his file hasn't been touched for months. Despite dealing with a client fire, this could pose ethical problems if a bar complaint for neglect is filed. As your practice multiplies, keeping track of work-in-process becomes exponentially more difficult. Fortunately, there's free and low-cost software solutions you can integrate into your systems. We examine different technologies and discuss the importance of API in your CRM.

Wrapping it All Up - The Freedom Practice Process

There's a seven-step process to incorporating new concepts and strategies into your practice. In your ever-expanding orbit your firm's capabilities increase while your personal focus becomes more precise and narrows. Going forward you'll have a templet to implementing all of the ideas that you gained from Practice Xcelerator.

WORKSHOP LOCATION

Freedom Practice Learning Center
1567 Hayley Ln Suite 205
Fort Myers, FL 33907
(239) 334-1141
4freedompractice.com



BEST AIRPORT

Southwest Florida International Airport (RSW)
11000 Terminal Access Rd
Fort Myers, FL 33913

AVAILABLE HOTELS

The Luminary Hotel
2200 Edwards Drive
Fort Myers, FL 33901
(833) 918-1512
luminaryhotel.com

Homewood Suites by Hilton Fort Myers
5255 Big Pine Way
Fort Myers, FL 33907
(239) 275-6000
Hilton.com

Hilton Garden Inn Ft. Myers
12600 University Dr.
Fort Myers, FL 33907
(239) 790-3500

Home2 Suites by Hilton Fort Myers
4333 Ford St
Fort Myers, FL 33916
(239) 225-9250
Hilton.com

Hampton Inn & Suites Fort Myers
4350 Executive Cir
Fort Myers, FL 33916
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**Courtyard by Marriott
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Greek Restaurant**
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