



Agenda

Day 1

8:00 Tom Welcome, leader introductions, individual introductions; what they want to get from the training and coaching

9:00 Break

9:15 Ruth

- Cool Track Business Plan Roadmap Handout
- Financial Training: profits are not cash; cash flow

10:30 Break continue

Noon lunch

1:00 Mike

- Marketing defined; Cool Track 12-Point Marketing System: Lead Gen, Lead Conversion, Client Retention
- Touch Point Defined: Guerilla Marketing
- Sample Marketing Plans \$500K, \$1M, \$2M

2:00 Break continue

3:15 Break continue

3:30 Tom

- Vision Casting: The \$1,500,000 Comfort Consultant
- How many leads, what close rate, what average job selling price.
- Comfort Consultant compensation plan

4:30 Tom

- Wrap Up and Homework



Agenda

Day 2

8:00 Ruth

- How to grow ESA Clients and Sales
 - » Include ESA in all sales
 - » Dispatcher sets the stage for the technician and sends the homeowner to the web site for a \$10 discount
 - » Tech uses Flat Rate and Service Invoice with ESA Cost Comparison (with Decline Choice)
 - » Tech leaves a completed ESA on all calls
 - » Dispatcher advises ESA renewal time to the homeowner on the phone...set up for tech

9:00 Break

9:15 Tom

- TRUST and CHOICE Defined
- System Selling
- Benefit Selling

10:30 Break

continue

Noon lunch

12:45 Ruth

- How to price for a profit

1:45 Break

continue

2:00 Tom

- Creating the sales plan
- Creating referrals and a referral network

2:30 Mike

- How to create sales leads to reach your sales plan
- Your lead generation marketing plan for Feb, Mar, April
- Ruth's "Did you know..." letter

4:30 Tom

- Wrap Up and Homework