

THE ESQUIRE ACADEMY

SPECIALIST INSTITUTE

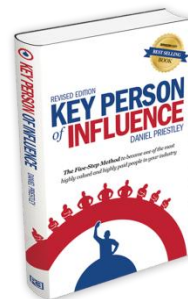
Advanced Training Program- Curriculum

Orientation- Introduction to Key Person of Influence Method

- Program Orientation- The Big Game
 - o Your Mountain of Value – Passion = Success
 - o Who are the players (key individuals)
 - o What is the prize? How do you define a “win” or a “lost”?
 - o Your Mountain of Value

Please Note: Before starting this program you MUST already have identified your specialty planning area which you plan to focus your practice on long term and have developed a specific marketing plan for your specialty based upon the Esquire Academy trainings. This will serve as your project to improve upon during the course of this training.

Required Reading: Key Person of Influence By: Daniel Priestley



Week 1: Identifying Your Affinity Market and Perfect Pitch (Step 1)

- Identifying Your Market Who
 - A person's why is found 5-6 questions deep.
- What are affinity markets?
- Where do we find them? How
 - Networking/Groups
 - Sales Funnel
 - Referral Sources
 - Events
 - Online
 - Advertising
- How do you pitch to them?
 - Beware of polite responses.
 - Discover your big game.
 - Idea centers around a problem, delivers clear benches
 - External
 - Internal
 - Philosophical
 - Constructing your pitch.
 - Position - Who you are and why you're worth listening to.
 - Problem – Call Attention to the problem you want to highlight.
 - Projection – What ripples does the problem create?
 - Proposal – Offer solution.
 - Proof – back it up with credibility/story.
 - Project – Action/follow-up steps.

Assignment: Following the guidance and examples provided to you map out and identify your Affinity market including demographics and psychographics then develop a Pitch statement for your market.

Week 2: Identifying Your Role as a Key Person of Influence (Steps 2-4)

Introduction to Steps 2-4 of Key Person of Influence

Step 4 – Raising Your Profile

- Why you need to be seen as an expert
- Developing an online profile
- Developing an in-person profile

Step 3 – Productizing Your Value

- Developing a Product Ecosystem
- Productizing your specialty services
- Productizing your content

Step 2 – Publishing Your Ideas

- Using your pitch/message and your products to develop content
- Marketing channels
 - o Events
 - o Networking
 - o Online
 - o Groups/Affiliations
 - o Advertising
- Types of Core Content
 - o Blogs
 - o Articles
 - o News/Press Releases
 - o Infographics
 - o Videos
 - o Interviews
 - o Legal Guides
 - o Books/E-book

Assignment: Write out your long term vision for what you want to become as a Specialist in as much detail and scope as possible. List any and all current product offerings and services related to your specialty, then come up with ideas of bundles based on your research from Step 1. Finally, identify what types of content you plan to focus on by rating each as high, low, or medium priority for your market approach.

Week 3: Identifying the Relationships You Need and How to Use Them (Step 5)

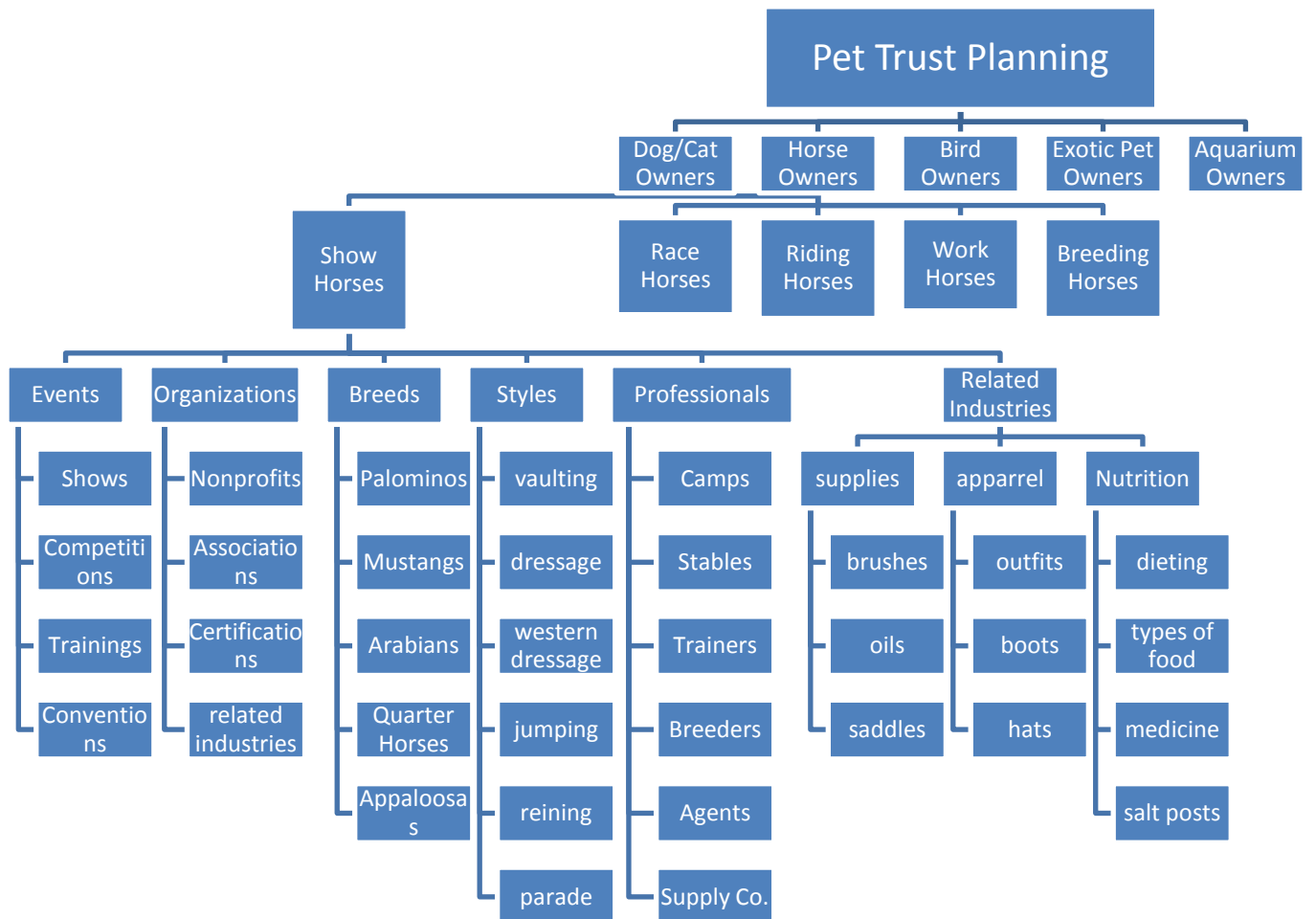
- Introduction to Relationship Building as a Specialist
 - o Key Person of Influence Method
 - What's in it for me?
 - Respect and subject matter expertise
 - Built in value for all parties-BtoB
- Identifying KPI's and Allied Professionals
 - o Who are they?
 - o Connect bridge between what they do and what you do.
- Following up with Referral Partners
 - o Top of mind awareness,
 - o Know, like and trust
 - o Create reasons to see them again
- Collaboration and Joint Ventures with allied professional
 - o Types of capital and leveraging your capital
 - Human Capital – more potential/time?
 - Potential Capital – more influence?
 - Resource Capital – more money?
 - Intellectual Capital more information?

Assignment: Review and address issues with your marketing plan. Review your current Top 10 list and come up with action plans to better connect and collaborate with them. Create a list of 10 dream referral sources for your specialty and plans for how you might connect and collaborate with them.

Step 1:

Identifying Your Affinity Market & Your Perfect Pitch

(Example of Demographic Research)



Psychographics- Based on the demographics

What are their pain points?

What concerns them?

What problems do they need help with?

What are their buying patterns?

What do they value?

What keeps them up at night?

Why do they do what they do?

How do they think?

Examples of a Pitch-

Should have:

Position - Who you are and why you're worth listening to.

Problem – Call Attention to the problem you want to highlight.

Projection – What ripples does the problem create?

Proposal – Offer solution.

Proof – back it up with credibility/story.

Project – Action/follow-up steps.

Example 1:

I'm an estate planning attorney focusing on Pet Trust Planning. If you're a horse owner, your horses deserve to be taken care of properly even when you're gone. For example, if you have a competition parade horse, you wouldn't want someone to allow them to go too long with briars in their tail or forgetting to shoe them on schedule. We think about these things when we leave for a few days on vacation but seldom consider what would happen if we died or became incapacitated. We help horse owners to preserve the value of their animals and make sure they'll be cared for properly by planning for it in their estate. As a firm focused on estate planning we address these types of issues regularly and would love to sit down sometime and review your situation.

Step 2:

Creating and Publishing Content

Content Class	Type of Content	Priority (low/high)
Online	Social Media Posts Blogs Articles Legal Guides Videos Reviews Infographics	
Speaking	Seminars Podcasts Interviews CLE Trainings CE Trainings	
Events	Trade Shows Conferences Sponsorships Community Events Client Appreciation Award Presentations	
Publishing	Books E-books Articles Trade Journals, etc Press Releases Newsletters	
Advertising	Mailers TV Ads Radio Ads Google SEO Billboards Signage/ Banners	
Recognition	Advanced Trainings Awards Certifications Board Positions Endorsements	

Step 3:

Identifying and Productizing Your Services

List Existing Services/ Products

What are product bundles that make sense based on Step 1?

Step 5:

Identifying Professional Relationships and How to Use them

Who is currently on your Specialty Top 10?

<i>Name/ Company</i>	<i>How is Relationship Now?</i>	<i>What are 2 ways you can collaborate with them?</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Who would be the Top 10 Dream/ Golden Goose Relationships?

<i>Name/ Company</i>	<i>What would we approach or meet them?</i>	<i>What are 2 ways you would collaborate with them?</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		