

TAP In

Step Up & Stand Out

Business Accelerator



THE APPROACH COACHING METHOD





Who is this for



The driven achiever standing at the threshold of potential, hungry for more than the status quo, always asking, "how can I do this better?"

That "HOW" lives within Strategy.

Knowing that systems are nothing more than strong strategies set on repeat.

This annual cohort is for those looking to have impact on the:

balancing act between business owner & practitioner

time management circumstances stunting the ability to scale

business minded peer groups

battling the relationship war

finding the trusted “whos” needed for delegation

creation of profitable, sustainable, predictable business models

guidance around not being a slave to the immediate

fair market pricing standards for services & resources

required cohesion between carrier, distributor, supplier, & owner

affiliates that understand the intricacies of advice based industry



The Gap



3 decades of industry experience, 200 Advisory based Business interviews, 27 leadership talks, vast experience in developing practice management divisions, 30,000+ professional coaching hours, and holding a seat on 2 Advisory boards, beta tested 5 cohort groups, dedicated 5 years in designing the “TAP In” Cohort.

This annual evolutionary program addresses the gaps by design, not default.

- **business planning that is obtainable, measureable, and ongoing**
- **addressing those that are so self aware that they know “this” is bigger than themselves alone**
- **directional feedback loop as this is the greatest desire of many**
- **transformational vs tractional**
- **addition of extra data points beyond POP testing**
- **personalized planning for a very personal business**
- **a program that requires a minimum of 1 year**
- **cohesion built on trust, transparency, and reciprocity**
- **addressing business and lifestyle**
- **respectfully, anything beyond fundamental practice management training is difficult to scale within distribution. Outside resources are required.**



What is solved



By solving the Business Development need with logic and connection, we get to help millions.

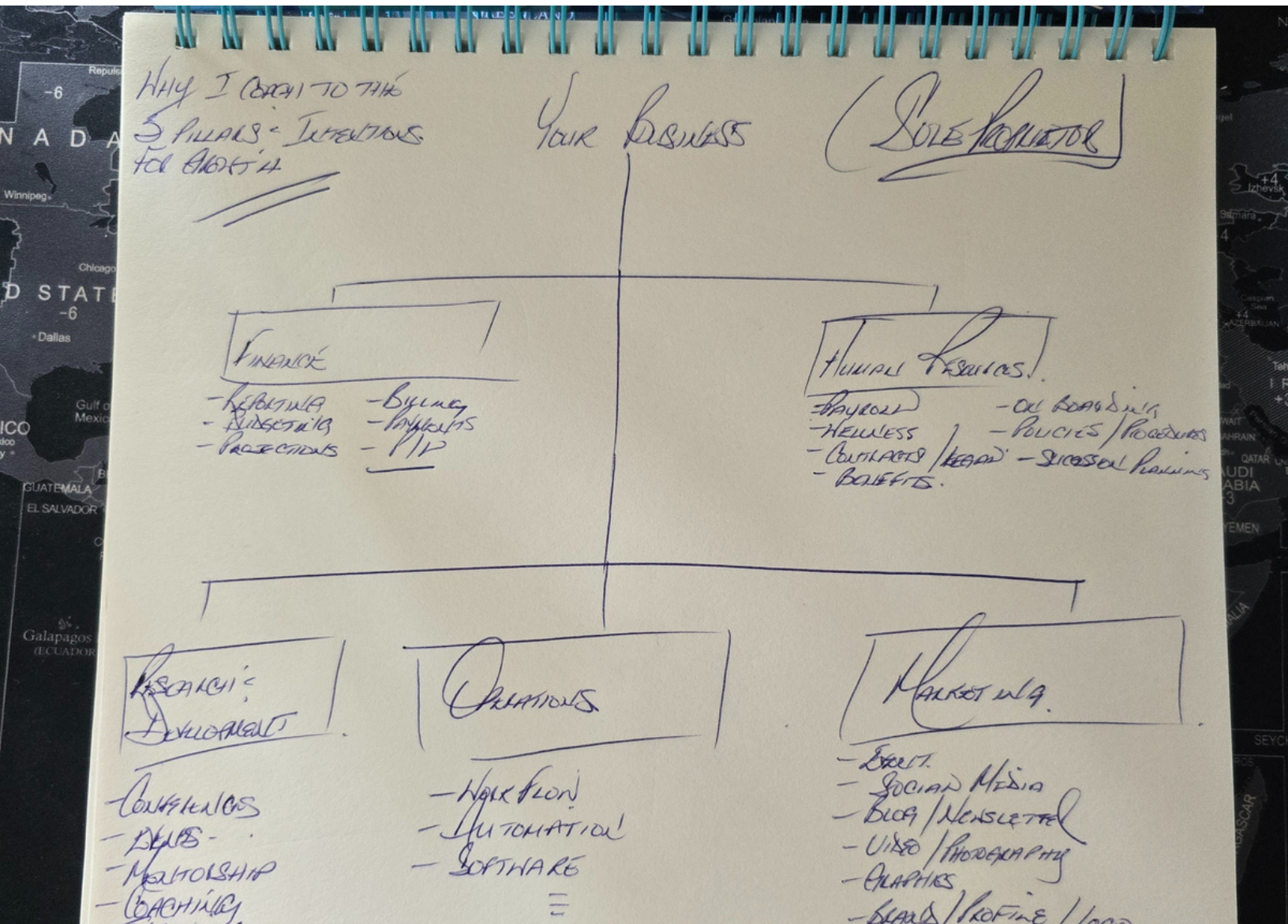
The Advisor who is driven however stuck in the ability to scale. The Distributor who is spread thin and looking for a partnership that compliments existing programs. The Carrier who is challenged with supply chain inefficiencies due to requests being in 'not in good order.' The external Service Providers with watered down offerings due to entrepreneurial challenges. An industry that has not moved the dial in recruitment of talent, leaving only apx 3% of new advisors surviving past 2yrs. Finally, and most importantly, the largely unserved middle market, the public who is struggling and wants advice however is making ill-informed decisions.

The largest transfer of wealth in history has started. In approximately 20yrs, we will be at the height of over \$70 trillion moving from one generation to the next. The scale and need of what we will build will take years to implement. We have the logic and connection to support those who understand the future of Financial Services, within the Independent space, is not Financial. It is going Beyond the Product they sell by connecting the diverse needs of all stakeholders.

What is solved



By solving the Business Development need with logic and connection, we get to help millions - Business Owners, Families, Clients; Small Business.





What is solved



The short answer: Structure, Strategy, Tactics, Accountability

Weeks covering:

Budgeting

Projections

Value Proposition

5 Business Pillars for annual goals

Emotional Intelligence, Mindset

Automation

Workflow

Onboarding

Systems

Media descriptors

Marketing

Video, Photography

Surveys, Feedback forums

Copy, Captions, Content

Setting up policies and procedures

Client experience journey

Brand / Profile

“Good Practices”

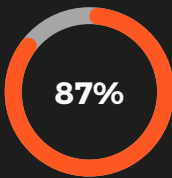
Access to Affiliate Tools & Teams

TAP IN

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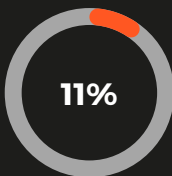


THE STATS



Cohort Learning

On average, the completion rate is 87%, with many reporting over 90%.



Self-study Learning

On average, the completion rate is 11%, with reportings as low as 3%.

[Link to Stats](#)

RETENTION

Knowledge retention after 2 weeks looking at learning platforms:

90% of what you say, do, and document.

70% of what you say.

50% of what you see and hear.

30% of what you see.

20% of what you hear.

10% of what you read.

COMMUNITY

There is a strong positive sense of community, and accountability within a cohort style of learning.

FOUNDATION

Business Development Planning must approached within a foundational, repeatable process. Logical evolution with points of measurement - year after year.

SUCCESS

How do you live a life within the highest business realm, still deliver, and reclaim the magic of a richer existence?

You remove limitations!

TAP In Step Up & Stand Out



ANNUAL BUSINESS ACCELERATOR AT A GLANCE

ROAD MAP



SETTING THE STAGE

Consistency is key, commit to practicing the habit weekly with daily activity to reinforce its development.

HEALTHY ROUTINE

You becoming familiar with your weekly outline of Weekly Focus, Mid-Week Mindset, and Week in Review.



THE POWER OF PATTERNS

Recognize and build on your existing routine. Having a key theme of evolutionary focus necessary in Business Life.

CREATE INSPIRATION

You adding detail. Weekly focus rotation of cycling through Create, Align, Lead, and Master.



BUILD A SUPPORT SYSTEM

Share your habit-building journey and accelerate your development. Engaging more with the Cohort and Accountability Partner.

ALIGN STRUCTURE

Enter into a stronger Mid-Week Mindset practice by adding in the routine of journaling to observe habits, and having deeper conversations.



LEARN FROM SETBACKS

Accept that setbacks are a part of the habit-building processes that accelerate your goals.

LEAD IN WISDOM

Recognize the accomplishments made to date. Analyze setbacks, and use them as opportunities to improve by leading with proven successful actions.



IMPLEMENT HABIT STACKING

Bring it all together for a repeatable and evolutionary process. To scale, you must remove limitations.

MASTERY

The end of each cycle is not the end, it is the beginning of your next goal. Lean on the foundation you have created, and continue the BIG WORK.

Included Resources

THE APPROACH COACHING METHOD

STEP-UP STAND-OUT

“The end of a goal is the beginning of the next. Tools and resources must be foundational and repeatable in order to create structure and identify patterns.”



42 Weeks of foundational tools, resources, and live cohort style coaching.



Vetted Expert Sessions covering Copy, Content, Workflow, Funnels, CRM, Video, Podcasting, and more.



126 - 1page documents delivered over 42 weeks. Designed to logically connect your annual plan.



3 PDF fillable Workbooks. Formatted for repeatable use and ability to share with external partners such as a Media team.



21 Training Sessions covering Value Proposition, Annual Action Plan, Budgeting, Business Pillars, and more.



1on1 Laser Coaching sessions designed around critical developmental phases.



The Outcomes You Gain

THE APPROACH COACHING METHOD

Phase 1: Business Essentials:



Building clear direction and focus, helping you achieve and measure your business goals.



Lead with actionable insights that enable you to make informed decisions, and drive tangible results.



Simplified foundational plans are easier to implement, evolve from, and communicate.



Fundamental plans enable adaptability to changing market conditions, allowing for quick adjustments and pivots as needed.



Make your actions effective when onboarding team members, stakeholders, hired resources, or investors.



Cut out unnecessary complexity, allowing you to execute strategies more efficiently. Streamline your time, manage your energy.

What is Included

THE APPROACH COACHING METHOD

STEP-UP STAND-OUT

“Simplicity is Sophistication: Build a Profitable, Sustainable, Predictable Business Plan connecting IQ & EQ.”



Serve your target market by defining their unmet needs, how your business addresses these challenges, and the expected outcome.



Strategies to attract and engage your ideal clients through targeted events and marketing initiatives.



Build effective and proven communication strategies to convey your value proposition clearly and authentically.



Learn how to track key metrics, manage expenses, and optimize revenue streams for sustained business success.



A structured approach to prioritize and implement key initiatives for business growth and success.



An adaptable planning template, providing a solid foundation for your growth, designed to evolve year after year.



The Outcomes You Gain

THE APPROACH COACHING METHOD

Phase 2: Business Accelerator:



Learn how to scale by removing the limitations that are keeping your growth stagnant.



A graduated approach that builds good habits. Giving you structure, keeping you focused, and accountable.



Implemented strategies to simplify and articulate your ideas in a manner that is meaningful and purposeful.



Accessing your core essence of what you are driven to do. Harnessing your relationship between personal and professional development.



Continually move forward because you have a foundational and repeatable process.



Be surrounded by like-minded individuals giving you a sense of belonging and confidence.

What is Included

THE APPROACH COACHING METHOD

STEP-UP STAND-OUT

“To scale, you remove limitations and implement resources rooted in structure.”



Weekly Focus Exercises.
Fillable format emailed
directly to you every
Monday.



Week in Review Exercises.
Fillable format emailed
directly to you every Friday.



Weekly Cohort
Accountability Call hosted
on ZOOM. Agenda driven,
and designed for impact.



Assigned Accountability
Partner. Intentional
connection with a cohort peer
having relatable interest.



Mid-Week Mindset
activities. Aligning your
professional and
personal EQ.



Ongoing Coaching insights
sent directly to you, and a
correlated report at the
end of each 12Week phase.

Weekly Overview



WEEK 1

Monday - Target Client.

Setting up your week ahead.

- Coaching Zoom: How to Identify and Niche Inward.

Wednesday

- Mid-week Mindset: Curate Your Environment

Friday

- Week in Review: Connecting the emotional patterns

WEEK 2

Monday - Target Client.

Setting up your week ahead

- TAP In Expert Zoom: Media, How to use Imagery to attract your Target Client.

Wednesday

- Mid-week Mindset: Prospecting, sifting to get to the Gold.

Friday

- Week in Review: Connecting the personality patterns.

WEEK 3

Monday - Pains, Problems, Needs, Gaps

Setting up your week ahead.

- Coaching Zoom: Formula to state, solve, and educate.

Wednesday

- Mid-week Mindset: Life you desire; what is success?

Friday

- Week in Review: Connecting the common resource beyond the product you sell.

STEP-UP STAND-OUT

FAQ's



What does each week look like?

Monday - receive your weekly agenda and preview for your ZOOM cohort training.

Wednesday - receive your mid-week mindset challenge

Friday - receive your week in review document

Each week is a gradual build on the previous, giving you a logical connection.

If I am stuck, do I get any 1on1 time?

YES! Every Cohort member has access to 1on1 Coaching time in addition to Monday ZOOM cohort training, and weekly exercises. This is NOT a "hands off" program.

Why would I benefit from joining?

As a High-Achiever driven to make a difference, it has never been about "starting something". The challenge you face is "finishing something". The programs within "Tap In" are designed by taking all elements needed to create structure and accountability. Helping you identify good habits so that applying discipline does not become a struggle, it becomes a positive influence for growth and motivation. "Tap In" has been reviewed by accomplished experts in the field of Neuroscience and Psychology.

Will I be able to use the tools received year after year?

YES! I want you to be successful. One of the biggest challenges I see is the, "New Year, New Program" approach which significantly delays your success. The tools within ALL programs residing in "Tap In" are foundational. As a Coach, it is my goal for you to have evolutionary tools.

I have a team. Would you suggest including them too?

YES! YES! and YES! Build a culture. Keep your team informed and invest in their goals.

TAP In - Your Week in Review

February 26 to March 1

RESPOND TO EVERY REFLECTION USING THIS FORMAT:
"BECAUSE I XYZ I GET TO ABC."

Your progress this Week?
WHAT HAVE YOU SPECIFICALLY ACHIEVED AND HOW HAS THAT MOVED YOU FORWARD?

How did you Lead this week that added structure?
WHAT DO YOU NEED TO GIVE YOURSELF A PAT ON THE BACK FOR? DID YOU SHOW UP WITH WISDOM?

How did you "smash" an obstacle this week?
SOMETIMES THE BEST WAY TO LEAD WITH WISDOM IS TO REMOVE LIMITATIONS AND THOSE YOU PARTNER WITH THINKING YOU "NEED" TO DO EVERYTHING NOT WISDOM :)

Appreciation. Who DID you Thank?
WHAT ARE YOU GRATEFUL FOR? WHO ARE YOU GOING TO MAKE A POINT TO FOR WHAT THEY DID FOR YOU, OR TOWARDS THE "GREATER GOOD"?

What is 1 thing you are going to do differently next
LOOK AT EVERYTHING YOU'VE REVIEWED ABOVE AND THINK OF ONE THING YOU COULD DO DIFFERENTLY NEXT WEEK. IT MAY SIMPLY BE HOW YOU DECIDE CHOOSE TO SEE THE WORLD. IT COULD ALSO BE AN ACTION YOU TAKE. A T QUOTE YOU FOCUS ON OR SOMETHING ELSE - BUT IT WILL BE UNIQUE TO YOU.

The Approach Coaching Method

6. Follow-Up After the Event:

- Sending a follow-up message, even a simple one expressing gratitude for the connection, keeps the momentum going.
- Sharing your top takeaways and inviting them to share theirs fosters continued conversation and engagement.
- Including a "Book time with Me" link in your email signature streamlines the process for scheduling follow-up meetings.

By incorporating these tips into your networking strategy, you'll not only make meaningful connections but also lay the foundation for long-term, mutually beneficial relationships.

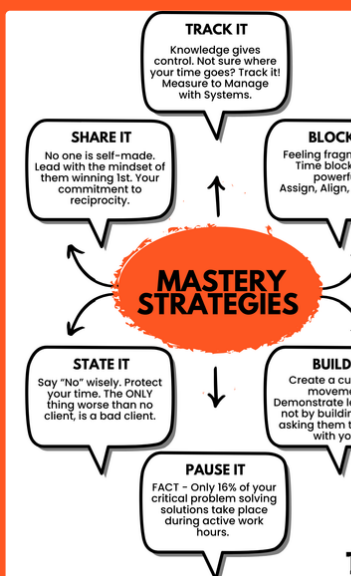
BONUS - Keep a drink in hand. Sometimes you will need an "exit strategy". A bio-break or refill is the perfectly polite way to step away. Also, having something in hand keeps us from fidgeting.

126 1-page tools delivered to you in a logical manner.

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TAP In - Your Week Ahead, March 25 to 29

My theme this week: Q1 Wrap Up!

BIG WORK

Top 3 Priorities this week.
If I did nothing else other than these three this week, I would be happy.

Long-term Goals.
By reflecting on my activities for Q1, how am I going to measure success towards my long-term goals?

Smash these Obstacles!
After reflecting what obstacles do I need to remove in order to reach my long-term goals?

Clearing the Decks!
What will I do this week in order to start Q2 without any clutter?

What I MUST remember this week:
Any takeaways, accomplishments, events, things I must remember to bring etc.

My Distractions or Interruptions: I need to be realistic.

Looking after You! What one action will you take to make sure you're good?

Productivity Accelerators
What ideas/activities, systems will I use this week to accelerate my ability to stay connected and committed to the Tap In Culture?

The Approach Coaching Method

Networking

TIPS CONT'D...

4. Make Introductions:

- Facilitating connections between individuals demonstrates networking prowess and can be mutually beneficial for all parties involved.
- Following up afterward to ensure the connection was made shows your commitment to fostering relationships beyond the initial interaction.

5. Simplified Contact Information Sharing:

- Utilizing QR codes or other creative methods for sharing contact information makes it easier for both parties to stay connected.
- Adding a personal touch, like logoed gum or mints, not only makes you memorable but also addresses a common networking concern (bad breath!).

6. Follow-Up After the Event:

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Mid-Week Mindset

TAKING NOTE OF WHERE YOU ARE

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Questions to Explore around your Current Reality & Future Self.

The main objective for you is to discover your options or opportunities for action. To do this, you must understand and measure where you have been before knowing where to go next.

Step 1 - look at your completed Weekly Focus documents and your calendar from January 28th to February 8th. Take a look at your activities. Look at the patterns. On average, what are the percentages of activities that you consider being creative time, alignment for structure, opportunities that have you lead, and efforts towards your mastery.

Step 2 - explore the below. Take pen to paper and write down your thoughts. Not all questions may apply.

- How do you feel you best motivate yourself?
- What are the best ways for you to support yourself at this point?
- If you had no restrictions at all, who would you be?
- At this point, what's happening now to you? What impact or influence is this having? (this questions helps you identify the "restrictions".)
- Where do you feel you are now concerning your goals?
- So far, what has helped your progress? What has held you back?
- What do you feel you need to achieve your goals?
 - If you asked for this resource, what would happen?
- What could you do differently this time around?
- Has anybody you know achieved the same goal? How did they manage?
- Who is the type of person who will achieve the outcome you want?
- Who do you want to be?
- What values and principals do you stand for - that are important to you?

Tap In!

Establish the problem to be solved/goal to be achieved... Explain a certain point in time.

Explain why this was so important... Lay out the stakes for what it would mean to solve this problem or accomplished this goal.

Describe less successful efforts... Show what has been done in the past that didn't work... Show what companies typically do but you didn't want to emulate.