



## 90 DAY BUSINESS PLAN

# DMI ACADEMY: VIRTUAL WORKSHOPS SPONSORED BY ATHENE



## WELCOME TO DMI ACADEMY / INTRO TO VIRTUAL WORKSHOPS

### SESSION 1:

- Welcome – DMI overview
- Review agenda for the academy
- Timeline, commitment / expectations
- Importance and Value of workshops, review stats – How is DMI different?
- Review the DMI Webinar process/ materials
- Homework – Complete the 2021 Production & New Client Acquisition Goal Worksheet
- Q & A

### SESSION 2:

- Watch DMI provided Taxes and Retirement Webinar
- Whiteglove –
  - Technology for optimal conversion during webinars
  - Dynamic openings & top converting seminar/webinar closes
  - Strategies to maintain engagement throughout the presentation
- Homework – choose a webinar and begin practicing scripts and watching videos



## MASTERING 1ST, 2ND, AND 3RD APPOINTMENTS

### SESSION 3:

- Best practices on Pre and post event communications & activities
- 1st 2nd appt planned facts, 3rd appointment sales coaching
- Homework – Practice Webinar

## ATHENE PRODUCT TRAINING

### SESSION 4:

- Review next 30 days timeline, how to schedule and book workshops, continue practicing, tracker
- Homework – Practice webinar. Schedule and book workshops.



- Webinar booked in week 2 to be completed in week 3
  - By end of week 3, all four workshops should be booked
  - All four workshops should be completed no longer than a month.
- Homework: Practice presentation with your DMI sales consultant. Send a copy of your presentation to White Glove for review and feedback.



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- Practicing presentation
  - Make any presentation edits based off White Glove's feedback
  - Preparing for appointments
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- First workshop should be taking place
  - Complete rapport/reminder calls to registrants day before workshop, if applicable
  - Complete follow up calls and emails
  - Track results and submit workshop ROI tracker to DMI
  - Review ROI tracker and recording from first workshop to see if any changes you want to include for your next workshops
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- Complete the remainder of workshops and follow-up appointments