

BDA-Inspired Marketing and Sales Workshops

Week 4

Leading your business with a marketing plan and
taking responsibility for your sales process

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Welcome, Introductions, and housekeeping

- Serenity Prayer
- Host introductions
- Housekeeping and best practices
 - Muting, raising hands, chat feature, cross talk, service positions
 - Notes, save questions, homework
- Session 4 - Presentations and wrap up
- BDA Tool 12 - We are willing to be in charge and responsible for our business. Professionals such as accountants, lawyers, and consultants who work for us are not our Higher Power.

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Conference outline and overview

- Each week follows the same basic flow
 - Opening and check in, cover the topics with meditation
- After Party - moderated, support and Q and A, round robin style
- Drop in sessions - more support and Q and A, working session, moderated
 - These are intended to be times for you to come seek help and ask questions
 - Not heavily guided - focused on the people needing help and digging in
 - If no one is there at the start we may leave - may not use all the time
- Both have some flexibility in how they are run
- Final presentation

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What we will be covering

- **SESSION 1 - Identifying your ideal client and offer**
 - BDA Tools 9 and 10 – There is enough, being aware of the competition, principles before personalities
- **SESSION 2 - Identifying goals, strategies, and channels**
 - BDA Tools 5 and 6 - Dollars spent generate revenue, clarity about profit margins
- **SESSION 3 - Creating and implementing your path, message, method**
 - BDA Tools 7 and 10 - Doing what we say, holding clients accountable by invoicing
- **SESSION 4 - Wrap up and presentations**
 - BDA Tool 12 – Delegation, responsibility, and leadership in our businesses

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Attendee Introductions - 2 minutes each on any of the following

- Name, location, solvency, industry
- Key takeaways from last session
- Aha's or realizations from doing the homework
- Things that came from the 2 weeks of meditation
- Session 3 covered
- Right path, message, and method
- BDA Tool 7 - Pay our bills and invoice our clients promptly
- BDA Tool 10 - We detach from difficult personalities and poor paying clients and put principles before personalities

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Questions about last week - Path, Message, Method
Tools - Paying our bills and difficult personalities



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Tool time!!

BDA Tool 12 - We are willing to be in charge and responsible for our business. Professionals such as accountants, lawyers, and consultants who work for us are not our Higher Power.

- What do I do that shows I am in charge of my business?
- Do I take responsibility for my actions in my business?
- How do I hold myself and others accountable in my business ?
- Do I give and take instructions from professionals?
- How can I better let the HP help me in my business?

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Tool time!!

Meditation – HP please show me how to be in charge of and responsible for my business, as well as how to best work with professionals, to do your will in my business and to serve my clients in the way you would have me serve.

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Tool time!!

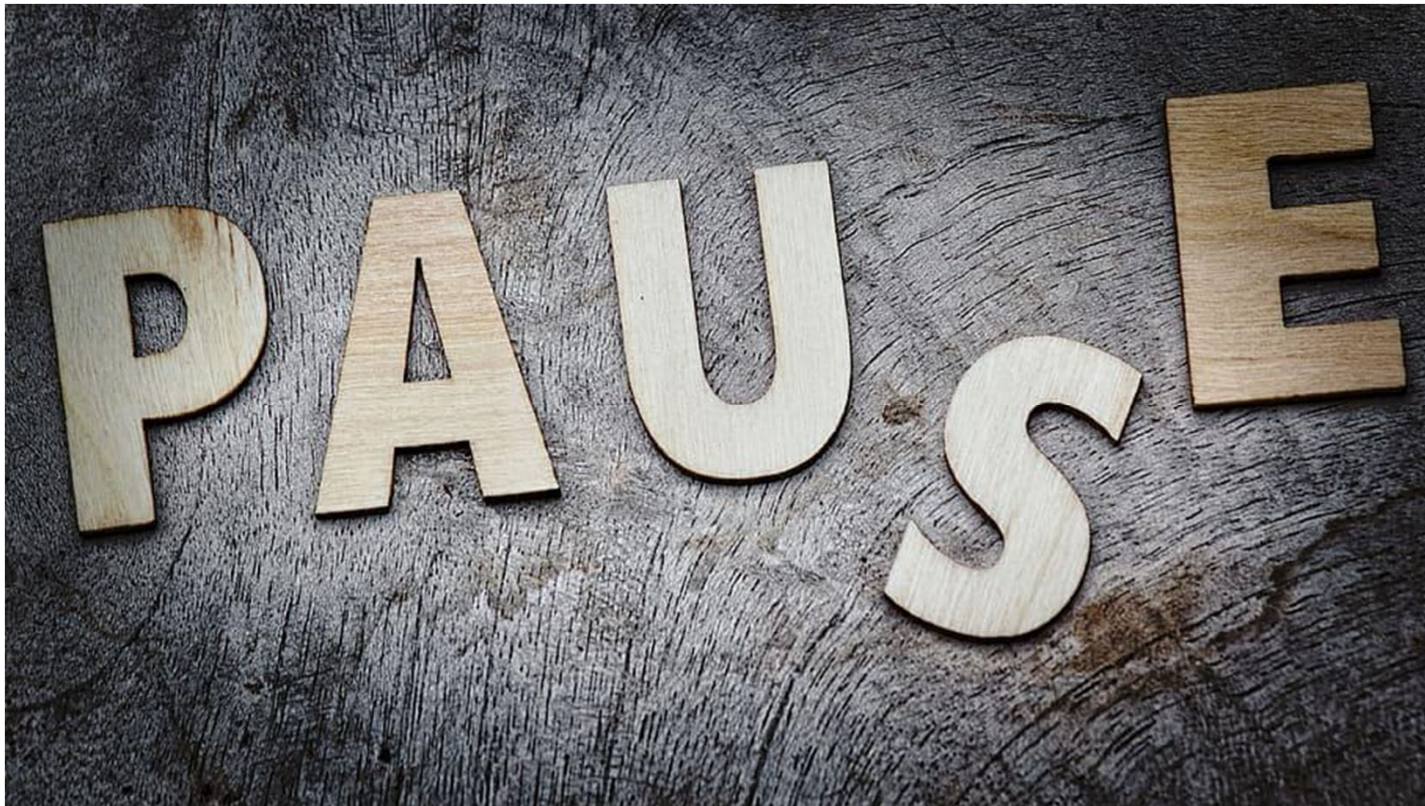
Care to share?

BDA Tool 12 - We are willing to be in charge and responsible for our business. Professionals such as accountants, lawyers, and consultants who work for us are not our Higher Power.

Meditation – HP please show me how to be in charge of and responsible for my business, as well as how to best work with professionals, to do your will in my business and to serve my clients in the way you would have me serve.

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Break Time!!



BDA-Inspired Marketing and Sales Workshop 4 Presentation time!!

BDA member owned Montessori School

Note: A 2nd presentation was planned and prepared, for a criminal law attorney's practice, but a family emergency made this 2nd BDA member unavailable to present. We will reschedule.

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Questions on the presentation or the process



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Presentation recap and thoughts

Nick's and Marc's Takeaways

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Support and Encouragement



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Wrap up and Recap

- We covered 8 considerations for business
- We covered 7 spiritual tools to include in marketing and sales plans
- We did some meditation
- We had 4 live sessions
- Plus drop ins
- And homework and hand outs!!

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Wrap up time!!

Thank you to our presenter and to all of you for your participation!



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Time
For
After Party!!