Coach the Coach

Understand models & Frameworks

Core Models

1. Demonstrate, explain and role play facilitator

2. Content/ Context – Red, Blue, Black & Green

3. PIES Model – discussion and demonstration

4. Functionality – Collateral/demonstration/stories/examples

5. Ideal Week – when, why, how

6. Positioning

7. Wheel of Life – when, why, how

8. 10-3-NOW models, 100 year plans

9. 3 year – 1 year – 90 days rocks

10. SCARF model

11. Solving and understanding the problem

    - Be able to demonstrate and discuss the issues

    - Significant Individuals to family boards

12. Bringing the theory to life – families

    - Direction, setting context

    - Demonstrating capabilities

13. Types of boards, advisory, sounding, business, family, professional best friend

14. Pricing of services, demonstration, casting a shadow

15. Able to articulate the value proposition of the SAN Suite

16. Able to run a SAN Network, help with core competencies

17. Use and explain/demonstrate collateral

18. Run 2 clients through the process (credibility)

19. Understand succession planning and collateral

20. Be able to coach and advise when necessary