



THE ALTERNATIVE BOARD®

Change Perspective. Improve Business. Enjoy Life.

TAB February 2010 Training Conference Agenda

Pre-Conference Training / Events

Start	End	Session	Location	Instructor
Wednesday, February 24				
2:00 p.m.	6:00 p.m.	Beginner Salesforce.com Training (Please note users must have their own laptops.) This session will cover how to Load lead lists, Create campaigns, Send mass communications, Schedule appointments and Manage a lead.	Standley II	Dave Scarola
Thursday, February 25				
8:00 a.m.	12:00 p.m.	Top Tier Board Meeting	TAB Corporate	Qualified Franchisees Only
7:30 a.m.	11:00 a.m.	Intermediate Salesforce.com Training (Please note users must have their own laptops.) Learn how to Re-market to your leads, Generate reports, Create dashboards, Sync Salesforce with a mobile device and Manage member records.	Standley II	Dave Scarola
		Using Business Financials for Member Retention (Please note this session assumes a basic understanding of financial statements. For a review of the basics, click here.) <ul style="list-style-type: none"> • Improve your skill and confidence in reviewing key financial information with members to answer four questions: What's happening, Why is it happening, What does it mean to the business, and What are the implications going forward. • Increase your skill in identifying and developing key KPIs given a financial statement. 	Standley I	Peter Begin Ed Kleinman
11:00 a.m.	12:00 p.m.	New Franchisee Meeting	Standley I	FAB representatives
12:00 p.m.	1:50 p.m.	Franchisee Meeting/Lunch (Franchisees Only)	Westminster Ballroom I	FAB Council
1:50 p.m.	2:00 p.m.	Break / Transition to Conference		

Main Conference Training / Events

Start	End	Session	Location	Instructor
Thursday, February 25				
2:00 p.m.	3:00 p.m.	State of the TAB Community	Standley I & II	Jeff Goergen & Jason P. Zickerman
3:00 p.m.	6:00 p.m.	Facilitator Peer Boards	Standley I & II	Facilitated by Top Tier or designated 'lead facilitator'
6:00 p.m.	8:00 p.m.	Cocktail Reception at TAB Corporate Headquarters	TAB HQ	Shuttle buses available at hotel
Friday, February 26				
7:00 a.m.	5:30 p.m.	Knowledge Center Hours	Foyer	
7:00 a.m.	8:00 a.m.	Continental Breakfast	Foyer	
8:00 a.m.	12:00 p.m.	Maximizing Your Results with One-on-One Meetings Improve your ability to present TAB's value to prospects by increasing your skills in implementing the first four steps of the six step sales process, which include the appointment time frame, neutralizing the primal lack of trust, finding the prospect's emotional needs, and getting a move-forward agreement.	Standley I	Brian Nelson Carol Crawford
		Effectively Coaching Your Members Boost the value members receive during coaching sessions by increasing your skills in: <ul style="list-style-type: none"> • Setting clear objectives for the coaching sessions. • Handling a member's lack of accountability in an effective manner. • Preparing a member for their next board meeting. 	Standley II	Bob Zelnick Stephen Swanson
12:00 p.m.	1:30 p.m.	Luncheon	Westminster Ballroom I	
1:30 p.m.	5:30 p.m.	Overcoming Objections to Using Strategic Business Leadership Learn how to move members past potential resistance to SBL by: <ul style="list-style-type: none"> • Increasing your skill in working members through their resistance to using the tool. • Enhancing your ability to move members through key steps within the tool to ensure they receive immediate value from its use. 	Standley I	John Keener Doug Roof
		Successful Board Facilitation Increase the value members receive during board meetings by improving your skills in: <ul style="list-style-type: none"> • Using the clarifying process so that advice/suggestions given are directed at the real issue. • Managing members as they provide suggestions and advice so they stay on track. • Summarizing the information provided so that everyone gets value. 	Standley II	Bob Kramer Jeff Raynor
6:30 p.m.	8:30 p.m.	Committee Member Recognition Dinner	Boulder Chop House	All Committee Members

Main Conference Training / Events (Continued)

Start	End	Session	Location	Instructor
Saturday, February 27				
7:00 a.m.	12:20 p.m.	Knowledge Center Hours	Foyer	
7:00 a.m.	8:00 a.m.	Continental Breakfast	Foyer	
8:00 a.m.	12:00 p.m.	It's Your Board: Creating Self-Governing Boards and Increasing Member Retention Learn about the impact self-governing boards can have on your member retention and techniques for supporting self-governance on your boards. <ul style="list-style-type: none"> • Understand self-governing boards and why they increase member retention. • Learn the TAB facilitator's role in managing and providing value to self-governing boards. • Find out how to handle challenges that may arise when developing self-governing boards. 	Standley I	John Dini
		Mastering the Interview and Close Process Gain more confidence in your closing ability and increase your close rate by enhancing your skills in: <ul style="list-style-type: none"> • Managing objections during the close • Overcoming your greatest competitor—your prospect's fear of change. 	Standley II	Bruce Gernaey Cathy Lawler
12:10 p.m.	12:20 p.m.	Conference Close: Final Comments	Standley I & II	
12:30 p.m.	2:30 p.m.	TAB-FAB Council Member Lunch Meeting	Standley I & II	