

Initial Training Agenda

		Topic	Learning Outcomes	Handout	
DAY ONE	8:30	Welcome and Introduction of Trainees	Begin to get to know the others participating in training		
	9:00	Expectations for Training and Beyond	Understand the training program and how to make the most out of the training		
	9:15	Plan for the First Six Months	Understand the steps a new TBO needs to take in the first six months to be successful	<ul style="list-style-type: none"> First Six Month Checklist (hardcopy and electronically) 	
	10:15	Break			
	10:30	Introduction to DISC and Understanding a DISC Report	Understand the elements of DISC and how to use the DISC and Motivator reports	<ul style="list-style-type: none"> Reviewing DISC and Motivator Results Protocol 	
	11:45	TABenos Exercise	Learn the value of doing a TABenos exercise with your board members by doing one	<ul style="list-style-type: none"> TABenos Handout 	
	12:00	Lunch			
	1:00	TAB Technology Platform	Understand TAB's Technology Platform and what tools are available to you		
	2:30	Being Prepared	Understand TAB's membership programs, peer board options, board meeting and coaching session basics, TAB's features and benefits and TAB's competition	<ul style="list-style-type: none"> Features and Benefits Handout Competition White Paper 	
	3:45	Break			
4:00	TAB Business Vantage Report Debrief	Understand the process of administering a TAB Business Vantage report and how to debrief members on the results of their report	<ul style="list-style-type: none"> TAB Business Vantage Report 		
5:30	End of Day				
DAY TWO	8:00	First Coaching Session Overview	Understand the elements involved in a first coaching session	<ul style="list-style-type: none"> TAB Coaching Sessions Protocols Months 1 - 12 	

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DAY TWO	9:00	Identifying 90-Day Goals	Understand how to create effective 90 day plans	<ul style="list-style-type: none"> 90-Day Goals Handout
	10:15	Break		
	10:30	First Coaching Session Role Play	Practice delivering the first coaching session	<ul style="list-style-type: none"> TAB Coaching Sessions Protocols Months 1 - 12
	12:30	Lunch		
	1:30	Coaching Sessions 2 - 12 including Strategic Business Leadership	Understand how to implement Strategic Business Leadership with your TAB Board Members	<ul style="list-style-type: none"> TAB Coaching Sessions Protocols Months 1 - 12
	3:15	Break		
	3:30	Coaching Sessions 2 - 12 including SBL (Continued)	Understand how to implement Strategic Business Leadership with your TAB Board Members	<ul style="list-style-type: none"> TAB Coaching Sessions Protocols Months 1 - 12
	4:30	Coaching Challenges and Q&A	Discussion and feedback on coaching challenges	
	5:30	End of Day		
DAY THREE	8:00	Your Role as a Facilitator/Coach	Understand your role as a trusted advisor	
	10:00	Break		
	10:15	Facilitating the First TAB Board Meeting	Practice delivering the first TAB Board Meeting of a new board	<ul style="list-style-type: none"> TAB Facilitation Protocols Months 1 - 12
	12:00	Lunch		
	1:00	Facilitating the First TAB Board Meeting (Continued)	Practice delivering the first TAB Board Meeting of a new board	<ul style="list-style-type: none"> TAB Facilitation Protocols Months 1 - 12
	2:30	Break		
	2:45	Facilitation Protocols for Months 2 - 12	Understand the first year of facilitation protocols	<ul style="list-style-type: none"> TAB Facilitation Protocols Months 1 - 12
	3:30	Facilitation Challenges	Understand how to deal with common facilitation challenges	

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	5:00	End of Day		
DAY FOUR	8:00	Accounting Services	Understand the franchise income statement and how to manage members in the accounting system	
	9:00	TAB Brand Overview	Understand the Branding Checklist and the importance of branding	<ul style="list-style-type: none"> • Branding Checklist
	10:00	Break		
	10:15	Campaign Operations	Understand how to manage your launch campaign	
	11:15	The Integrated Marketing Manual	Understand the many tactics used in marketing for new members	<ul style="list-style-type: none"> • Integrated Marketing Guide
	12:15	Lunch		
	1:15	The Integrated Marketing Manual (continued)	Understand the many tactics used in marketing for new members	<ul style="list-style-type: none"> • Integrated Marketing Guide
	5:00	End of Day		
	DAY FIVE	8:00	Sharing of Sales Experience	Share previous sales experience with the class
8:30		Effective Conversation using Specific Techniques	Understand how to effectively talk about yourself and effectively talk about TAB	
9:00		Why - Simon Sinek	Understand your "why" and how to use that when speaking to prospects	
9:20		30 Second Commercial and Your Personal Commercial	Be able to answer, "Why should I work with you?". Practice giving your 30 second and Personal Commercial	<ul style="list-style-type: none"> • 30 Second Commercial Handout • Personal Commercial Handout
10:30		Break		
10:45		Owner to Owner Calls	Understand how to call other business owners to talk about TAB Membership	
12:00		Lunch		
1:00		Owner to Owner Calls (Continued)	Understand how to call other business owners to talk about TAB Membership	

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	1:45	Networking and Referrals	Understand how to gain members through networking and referrals	
	2:45	Sponsors/Partners	Understand the importance of sponsors and partners during campaigns	
	3:15	Break		
	3:30	Overview of Events	Understand the three basic types of event presentations	
	4:15	The Importance of Confidence	Understand the importance of projecting confidence during member acquisition meetings	
	4:45	The Importance of Leading with an Offer	Understand the membership options offered during your TAB launch	
	5:15	End of Day		
DAY SIX	8:00	Removing the Barriers of Mistrust	Understand and practice effective bonding techniques	
	9:00	Discovery Meeting Overview	Understand the Discovery Meeting process	<ul style="list-style-type: none"> Discovery Meeting Protocol
	10:00	Break		
	10:15	Discovery Meeting Role Play	Practice delivering a Discovery Meeting	<ul style="list-style-type: none"> Discovery Meeting Protocol
	11:30	Discovery Meeting Role Play Debrief	Debrief the Discovery Meeting experience	
	12:00	Lunch		
	1:00	Overview of the 22 Questions/RFA	Understand the elements of a 22 Questions/RFA Meeting	<ul style="list-style-type: none"> 22 Questions/RFA Protocol 22 Questions Explained
	3:00	Break		
	3:15	22 Questions/RFA Demonstration and Discussion	See a demonstration of a 22 Questions/RFA meeting and discuss the demonstration	

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	5:00	End of Day		
DAY SEVEN	8:00	22 Questions/RFA Role Play	Practice delivering a 22 Questions/RFA Meeting	<ul style="list-style-type: none"> • 22 Questions/RFA Protocol • 22 Questions/RFA Worksheet
	10:00	Break		
	10:15	22 Questions/RFA Role Play (Continued)	Practice delivering a 22 Questions/RFA Meeting	<ul style="list-style-type: none"> • 22 Questions/RFA Protocol • 22 Questions/RFA Worksheet
	11:15	Role Play Debrief	Discuss your experience conducting 22/Questions/RFA meeting	
	12:00	Lunch		
	1:00	Post Close Activities	Understand how to complete the membership application with a new member and enter the application on the intranet	<ul style="list-style-type: none"> • Membership Application • Membership Application TD
	1:30	Questions and Objections	Understand how to respond to the most common questions about TAB and how to overcome the most common objections to TAB Membership	
	2:45	Break		
	3:00	What Now?	Understand what happens after Initial Training, the importance of additional training and coaching and the importance of pipeline management	
	5:00	End of the Day		
DAY EIGHT	8:00	Non-Membership Income from the TAB Opportunity	Understand the additional income opportunities made available through your TAB Business	
	9:15	Role Play Discovery and 22 Questions/RFA Meeting	Practice delivering the Discovery Meeting and 22 Questions/RFA Meeting	<ul style="list-style-type: none"> • Discovery Meeting Protocol • 22 Questions/RFA Protocol • 22 Questions/RFA Worksheet
	10:45	Role Play First Coaching Session	Practice delivering the first coaching session	<ul style="list-style-type: none"> • TAB Coaching Sessions Protocols Months 1 - 12

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	12:15	Lunch		
	1:15	Role Play Second Coaching Session	Practice delivering the second coaching session	<ul style="list-style-type: none"> TAB Coaching Sessions Protocols Months 1 - 12
	2:45	Role Play Third Coaching Session	Practice delivering the third coaching session	<ul style="list-style-type: none"> TAB Coaching Sessions Protocols Months 1 - 12
	4:00	Training Ends - Congratulations!!		