DailyDAC, LLC d/b/a Financial Poise™
1954 First Street, Suite 178 Highland Park, IL 60035
www.financialpoise.com 847.463.9530

FINANCIAL POISE WEBINARS
THE BUSINESS OF LAW & ACCOUNTING- MAKING MONEY AS A PROFESSIONAL SERVICE PROVIDER 2019
Series Summary

SERIES OVERVIEW

At a time when we are bombarded with news and information about the uncertainties of the economy, successful sales professionals (rainmakers) rest in comfort and confidence knowing that their success is not beholden to the ups and downs of the marketplace.

This series identifies essential Rainmaker Best Practices, that when focused on with discipline and intention, distinguish you and your firm, and help you gain a competitive sales advantage. These episodes focus on WHAT works in any market and HOW to implement the best practices to impact your business with increased revenue, increased leverage of time and resources, and improved accuracy and predictability in your sales pipeline- - all while managing your practice so that your level of service to your clients does not suffer.

As with every Financial Poise Webinar, each episode is delivered in Plain English understandable to investors, business owners, and executives without much background in these areas, yet is also valuable to attorneys, accountants, and other seasoned professionals. And, as with every Financial Poise Webinar, each episode brings you into engaging, sometimes humorous, conversations designed to entertain as it teaches. Each episode in the series is designed to be viewed independently of the other episodes so that participants will enhance their knowledge of this area whether they attend one, some, or all episodes.

DailyDAC, LLC d/b/a Financial Poise™
1954 First Street, Suite 178 Highland Park, IL 60035
www.financialpoise.com 847.463.9530

EPISODE SUMMARIES

EPISODE #1
Growing Your Practice
January 15, 2019 at 1:00 PM CST

Grow or Die. A common adage, yet elusive in both the WHAT and HOW to grow profitably. You have the skills, knowledge, and experience to deliver to clients. Now all you need is (more) clients. How do you transition from servicing work to bringing in work?

In this webinar, we discuss the essential building blocks for sustained and scalable growth that leverages marketplace and voice of the client research. We also identify how target marketing, messaging, networking, and relationship building tactics create predictability in lead generation through clients, prospects, connectors, and alliance partners.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

EPISODE #2
Legal Tech
February 12, 2019 at 1:00 PM CST

The only thing constant is change, and professional services firms are facing unprecedented disruption with innovation and technology. Legal Tech is a broad term that includes everything from products aimed at helping professionals ***a***nalyze matters faster, ***b***ill client more efficiently, ***c***ommunicate with clients better through contact management software, and so many more.

This webinar discusses the ABCs of tech for the professional service provider with a focus on how to leverage best practices in business process mapping, how to leverage the latest innovation in technology solutions for service delivery and data analytics, and how to create the ultimate client experience for sustained revenue and client loyalty. While the specific products discussed focus on legal tech products, the principles discussed apply equally to any professional service provider.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

EPISODE #3
Personnel Issues
March 12, 2019 at 1:00 PM CST

"Slow to hire and fast to fire" is the best way to manage your talent, yet many professional services firms do the opposite. Firms rush to recruit and fill open positions and allow substandard performance to linger longer than necessary to avoid the discomfort of termination.

This webinar focuses on essential best practices for creating optimal job profiles, developing engaging immersion and on-boarding programs, cultivating ongoing talent development through training and retention initiatives, and understanding how to facilitate termination processes with dignity and integrity.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.

EPISODE #4
Your Niche and Your Brand
April 9, 2019 at 1:00 PM CST

The greatest consumer brands in the world realize that branding is emotional, relational and must reinforce the brand promise through every touch and moment of engagement. Like consumer brands, practitioners have personal brands and brand promises whether or not they are being cultivated with intention or by happenstance. In this webinar, we discuss the competence and character traits that produce positive personal brands, how to develop a specific niche and channel for profile raising and how to elevate thought leadership for sustainable client attraction and business development.

This webinar is delivered in Plain English, understandable to you even if you do not have a background in the subject. It brings you into an engaging, even sometimes humorous, conversation designed to entertain as it teaches. And, it is specifically designed to be viewed as a stand-alone webinar, meaning that you do not have to view the other webinars in the series to get a lot out of it.