

Wheeler Business Consulting Leasing School Course Outline

Sunday Evening:	Orientation and Dinner
Monday Morning:	Introduction to the leasing/financing industry Recent history Terms and definitions Business ethics Future opportunities
Monday Afternoon:	Role of the lease broker Introduction to the equipment vendor Introduction to the end-user Introduction to pricing
Tuesday Morning:	Defining the vendor relationship Marketing to the vendors Vendor benefits Vendor objections/ overcoming objections Establishing/ maintaining/ eliminating vendors Pluses and minuses of vendor relationships
Tuesday Afternoon:	Pricing 101 Introduction to CRM systems Introduction to automation in marketing Conducting a vendor sales meeting
Wednesday Morning:	Defining the end-user relationship Marketing to end-users End-user benefits End-user objections/ overcoming objections Establishing/ maintaining/ eliminating end-user relations Pluses and minuses of end-user relationships
Wednesday Afternoon:	Pricing 201 Marketing automation Building a meaningful data base Turning a cold call into a warm call Working smarter - having your systems generate leads Business networks Where and who do you start calling first

Thursday Morning: Funding Source Relationships
 Credit 101
 Driving for the application
 Preparing a credit package
 Basic credit underwriting and basic credit analysis

Thursday Afternoon: Leasing processes
 Documentation
 Funding
 Collections
 Portfolio management
 Review of leasing ethics

Friday Morning: Summary of the week
 Question and answer Period
 Review of customized marketing materials.
 Role playing
 Review of support agenda
 a) One-on-One coaching schedule
 b) Webinars
 c) Monthly meetings

Friday Afternoon: Lunch and dismissal
 Graduation Certificates

