


How to Leverage Interpersonal Skills and AI in Modern Finance

BEST BUSINESS PODCAST
with Marlon Samson



BestBusinessCoach
"Your Success Is My Success" - Daryl Urbanski



This workbook provides valuable insights from Marlon Samson, Vice President of Finance at ICORE, Philippines, sharing his knowledge on finance, network building, and the impact of AI on the financial industry.

Understanding these skills is paramount in today's fast-paced corporate world where adaptability and building solid relationships can make or break careers.

Completing these exercises will solidify the interview takeaways, help you apply the lessons learned in your own professional journey and foster personal and career growth.

————— ” ” —————

"If you really want to climb the corporate ladder, you really have to learn how to manage those relationships."





REFLECTION/PERSONAL ANALYSIS

- Reflect on a time when you successfully fostered a professional relationship, how did it benefit your career?
- If you were in a position where you could create a training program in your company, what would you focus on?
- Do you agree with the assertion that AI will soon replace call center agents? Yes/No. Provide reasons for your answer.
- In your current or past professional experiences, how important has been the role of training in your growth and development?
- What, according to you, are the key implications of AI in the finance industry?

REFLECTION/PERSONAL ANALYSIS

- Describe how you've handled building relationships across different organizational divides in your career.
- What steps can you take to improve your networking skills within your current role?
- True or False? Training has a direct impact on an employee's growth. Explain your answer.
- How do you see the role of AI evolving in your specific job role?
- Think about a profession outside of call centers, how could AI impact this job?





REFLECTION/PERSONAL ANALYSIS

- How might you handle opposition to AI within your workplace?
- Provide an instance where you chose human interaction over AI's convenience.
- How do you think training could be improved in your current role or company?
- How could more robust training impact your day-to-day job?
- In the debate about AI taking up human jobs, which side do you lean more towards? Share your thoughts.

REFLECTION/PERSONAL ANALYSIS

- Based on your personal experience, rate the significance of managing relationships in the corporate world (1-10).
- Does your company currently use AI in their operations? If so, how has this impacted your role?
- Describe a scenario where AI would have a positive impact on your job.
- What steps would you take to effectively manage and foster positive relationships to thrive in your career?
- How have the insights from Marlon's interview reshaped your thinking about training and development?





REFLECTION/PERSONAL ANALYSIS

- What's your view about the role of a training department in a company?

- Would you recommend AI-based systems in your current professional role? Yes/No. Explain.

- Reflect on how the takeaways from this interview could be applied to your professional journey in the next year.



SITUATIONAL AWARENESS

Describe a situation where teamwork led to a successful outcome.

Describe a situation where you saw the impact of training on your or a colleague's career trajectory.



SITUATIONAL AWARENESS

Write a short statement on how you could incorporate Marlon's insights on human preference over AI in your corporate decision-making.

LISTING/ENUMERATION ACTIVITY

Key Takeaways

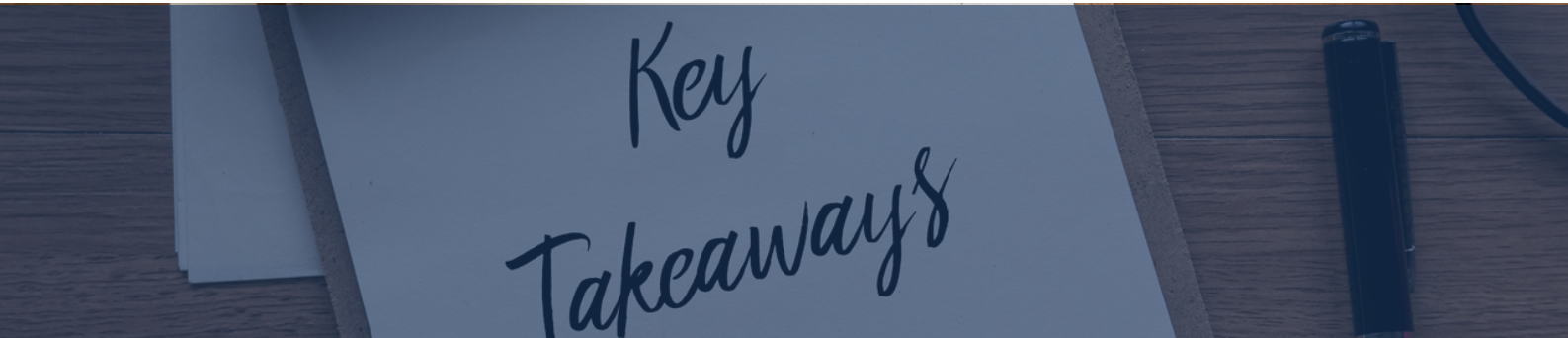
List three essential skills required for effectively managing relationships as you climb the corporate ladder.

- 1.
- 2.
- 3.

List three main takeaways from Marlon Samson's interview.

- 1.
- 2.
- 3.

Use these takeaways to enhance your approach to digital marketing, copywriting, and lead generation in the future.



Key
Takeaways



DARYL URBANSKI

FOUNDER | PRESIDENT OF BESTBUSINESSCOACH.CA
HOST OF THE BEST BUSINESS PODCAST

Daryl Urbanski is best known for his ability to create seven-figure, automated income streams from scratch.

First, as Senior Marketing Director for Neurogym. He helped generate over \$1.6 Million USD in under 8 months with a single marketing strategy.

This became \$7.5 Million USD in 3 years. He continued this success with multiple clients.

He's now set on a mission to help create 200 NEW multi-million dollar businesses. How?

Science & Accountability.

After 400+ expert interviews & \$50,000 in evidence-based research. He uncovered 8 critical business habits.

These 8 critical habits will determine who survives & thrives in these unprecedented times and who succumbs.

Daryl has quickly climbed the entrepreneurial ladder, gaining respect from thousands of business owners worldwide.

An author to speaker, marketer to coach - Daryl's multi-faceted business approach sets him apart as one of the leading business experts of his generation.



BestBusinessCoach^{CO.}
"Your Success Is My Success" - Daryl Urbanski



SUGGESTED TOPICS:

8 Critical Success Factors

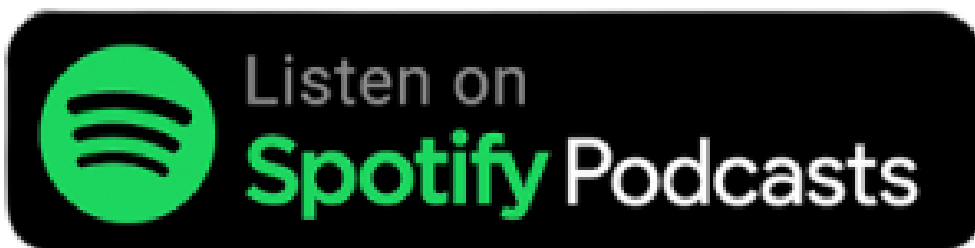
1. Self-efficacy
 - Personality Traits
 - Leadership Skills
 - Personal Disciplines
2. Strategic Planning
3. Marketing Strategy
4. Market Intelligence
5. Sales Strategy & Skills
6. Money Management
7. Business Operating Systems
8. Business Intelligence



FEATURED ON



The **enchantingLawyer**[™]
with
Daryl Urbanski on using
automation to grow your business



Who is Daryl Urbanski?

Daryl Urbanski
13 hrs · 🌐

Have I ever helped you in any way? How? Can you please share? I'm curious to know what and who's out there. The more specific you are the better.

Like · Comment · Share

Varena Dee, Ismail Abdallah and 5 others

Jennifer Jonassen You where a listening ear,when I was at a very low point and for that. I am grateful.xo
Unlike · Reply · 1 · 7 hrs

Tom McGuire You helped me grow my mma school. I was on a call with you and another expert. He gave some good advice. You gave me GREAT advice! Thanks!!!!
Like · Reply · 6 hrs

Rukstar Lorde You have helped me and the whole family in a huge way. I'll never forget. You used your facility, time, money and effort to fundraiser for baby Fatna.
Like · Reply · 5 hrs

Amie Loxton Some days when I'm feeling down I look at your posts. You're always so positive and uplifting. Totally turns my day around.
Like · Reply · 4 hrs

Ben Bush We where surfing in Solana and I was telling you about something spiritual and how I felt stuck. You told me to change my story and I was finally ready to hear that advice and it clicked. I always check my story now.
Like · Reply · 3 hrs

Varena Dee I just started paying attention to your postings and the one that caught my attention was if you gave someone \$1,000 how would they make it grow... First time I became interested in your posting ... have a lovely day...
Like · Reply · 3 hrs

"Your Success Is My Success" - Daryl Urbanski

Back (1) +1 (289) 700-1345

Text Message
Today 8:44 AM

Really appreciated your speech and table topic today.

Hello Daryl, this is Indraneel.

Love the sincerity and raw energy.

But, mostly importantly I love the undying passion you have for the betterment everyone.

I find it inspiring and is quintessential for all humans.

Text Message

Fido LTE 9:02 PM 46%

Search

Ye-hoshua Mumba ▶ Daryl Urbanski
Just now · 🌐

Hey Daryl Urbanski, I just wanted to take a moment to appreciate you and express my gratitude for your life. Thank you for your selfless pursuit in adding value to the lives of others, including my own. Thank you for being a great example of living a happy, healthy, wealthy and joyful life by truly serving others. I continue to learn from your awesome podcasts and your life and I just wanted to take this moment to acknowledge you. So glad that you've been reunited with your family and I hope ya'll have an awesome Thanksgiving! All the best and thanks again.

Like · Comment

Daryl Urbanski

Write a comment... Post

2 1

Fido 12:54 PM 52%

(7) **Eram Saeed** Online

😊

ok gotta go meditate now catch u later

😊

sooooo appreciate you my friend. this is my dream come true...building a profitable list

thank you!

Type a message here

Items	Num Credits	Sales	Credits & Returns	Monthly Total - Collected
558	39	\$87,811.00	-\$4,210.00	\$83,601.00
673	70	\$268,462.75	-\$11,046.00	\$257,416.75
1390	64	\$190,206.66	-\$12,916.95	\$177,289.71
1646	67	\$230,864.49	-\$9,930.50	\$220,933.99
1871	64	\$118,693.18	-\$8,863.99	\$109,829.19
1806	38	\$116,709.21	-\$5,642.00	\$111,067.21
1069	24	\$149,608.56	-\$6,471.00	\$143,137.56
1572	83	\$224,886.21	-\$13,710.00	\$211,176.21
1286	137	\$329,688.79	-\$25,535.25	\$304,153.54
1475	129	\$421,429.41	-\$30,063.00	\$391,366.41
1489	95	\$232,004.55	-\$18,441.50	\$213,563.05
1307	67	\$212,497.70	-\$14,737.98	\$197,759.72
		\$1,582,862.51		\$2,421,294.34
			Increase of:	\$578,425.67 23.89%

Today

Oh, I just realized it was thanksgiving and I never said thank you to you.

Thank you dear Daryl for being my mentor, coach, teacher, advisor, boss 😊 and a great friend. You are an angel of a person God sent my way & after my Allah, parents & teachers, I owe my professional success to you & only you! 🙏 I wish & pray you get happiness, peace, prosperity, wealth with health and a life partner as pure and loving as you are 😊 You're the best! Good Morning!

Messages Avriel Details

<https://youtu.be/wU0PYcCsL6o>

Thank you for everything.

Today 8:40 AM

You're an amazing man.

Good morning (^_^)/

That's a really nice thing to hear.

What makes you say that?

Thank you. Delivered

iMessage

Fido 9:54 AM 69%

Search

Who Can See This?

Ben Simkin 9 mins · Brisbane, Australia · 🌐

Daryl Urbanski is that guy whose IQ is through the roof but just quietly and unassumingly is achieving massive results and making the biggest difference in his clients lives

Like Comment Share

Fido 5:38 AM 84%

Search

Daryl Urbanski Yesterday at 1:39 PM · 🌐

Check This Out:

Had an exciting phone call with a new client today. In 20 minutes I showed her \$113,157.68 in cold hard cash she didn't even know existed in her business or how she could get it.

Now, with 2 weeks of work (she will delegate) 10%-80% of it will be in her pocket and add 5%-15% NET PROFIT to her bottom line for every year her business exists from now on.

(pats self on back)

Needless to say, she was pretty happy about it.

I really need to start charging more.

Write a comment... Post

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Marketing & Sales
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Consumer Behaviour
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Sales & Selling
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Best Sellers in Marketing & Sales

	Top 100 Paid	Top 100 Free
1.		

Ancient Secrets Of Lead Generation: Y...
by Daryl Urbanski
Kindle Edition
Free

- Best Selling Author
- International Speaker
- Proven Track Record
- Clients Currently Paying \$50k-\$150k + % Royalty


Young Entrepreneur Award



Daryl Urbanski
BestBusinessCoach.ca

At the age of 17, Daryl Urbanski did his first workshop with Bizbound.ca on 'How to Start and Grow a Successful Business'. Today, he is the author of the top selling book on Amazon, 'Ancient Secrets of Lead Generation: Your Primitive Business Guide to Better Leads with Less Effort', and owner of BestBusinessCoach.ca. He is also the author of two other books; 'Business Success Secrets, Principles, Formulas & Ethos' & 'Primitive Business Tools For Success'.

Award sponsored by

 **Collins Barrow**
Chartered Accountants



4:47 PM 33%

Search

Like Comment Share

65 people reached

Boost Post

0	65	0
Organic Reach	Paid Reach	Post Click

Scott Bradley likes this.

Scott Bradley
 Daryl Urbanski is the real deal. He knows his stuff, and can provide you with a TON of value that will help you in your business! I've worked with him personally, and not only did I experience that he is someone you can trust, but more so he comes from a pure place of service and really wanting to help you get what you need/want.
 Just now · Like · Reply

2:35 PM 59%

Search

Luis Rivera
 22 mins ·

Shoutout to **Daryl Urbanski** for being an absolute ninja and congruent in everything he does in the world. Much love brother.

Like Comment Share

Daryl Urbanski

Daryl Urbanski
 Thank you for your kind words.. Much appreciated. (^_^)

What makes you say this tho?
 14 minutes ago · Like · Reply

Luis Rivera
 Observation and appreciation. It's why I have you as my first appearance post on my timeline. Value in everything you share is uncanny. :)

Messages Mom Details

the same way.

I don't know what to do

Do it for them. I'm going to come back down and see the process through myself.

Today 9:12 PM

You are a great son

Text Message Send

Case Study

Turning \$50,000 USD into \$212,484 USD with paid ads and automation

Today's case study is the **CEO** of another USA-based company.

Her business caters to women in their 40s. Women who are into Reiki and other energy healing. Including alternative medicine techniques.

She felt trapped by her dependence on her industry peers. And their practice of promoting to each other's patrons. She didn't want others to sell to her community. Or even share her base with them just so her company can maintain growth. She wanted to be independent without sacrificing sales.

Thus, she turned to Daryl for a marketing solution. A solution to give her freedom from external influences.

Objectives

- Establish a profitable, fully automated paid advertising campaign to build her audience.
- Determine who are the company's best customers.
- Attract new customers and turn them into the highest paying clients.
- Create a membership program for a stable income growth.

What Daryl Did

- Established a “golden path” for lead generation and client acquisition process from the first to the sixth purchase.
- Analyzed 20,000+ orders to determine who their best customers are, where they come from, and how they make their purchases.
- Set up a paid advertising campaign for the first step their best customers took and automatically sent the next promotions for the second, third, fourth, fifth, and sixth products at the appropriate time.

Results

- Turned one-time buyers into multi-buyers in a predictable way
- Many people who bought a one, bought a second and third item. Immediate profit from paid ads was \$212,484 but if we include back end sales we grew her business by almost 26% or \$578,425.67.
- Produced a larger buyer base and enabled her to expand them without outside support.

Why It Was Smart To Work With Daryl

It was smart because he successfully helped her run a profitable paid ad campaign. The money she spent grew at least three times. She now has a larger list plus the ability to grow her list without any outside endorsement. She has a predictable way to turn first-time buyers into multi-buyers. She also has a clearer idea of who her target market is, who her best buyers are, and the multiple ways to reach them.

This has now become a cornerstone part of her business-enhancing every single big promotion she has done since then... with a bigger email list plus an understanding of how to use paid ads.

Evergreen Sales Report							
	EVG	MTD	YTD		ES-EVG	MTD	YTD
Week of May 30	\$127	\$127	\$127		\$13,673	\$13,673	\$13,673
Week of June 6	\$1,172	\$1,172	\$1,299		\$10,846	\$10,846	\$24,519
Week of June 13	\$2,315	\$3,487	\$3,614		\$13,977	\$24,823	\$38,496
Week of June 20	\$19,541	\$23,028	\$23,155		\$4,258	\$29,081	\$42,754
Week of June 27	\$5,375	\$28,403	\$28,530		\$1,272	\$30,353	\$44,026
Week of July 4	\$3,319	\$3,319	\$31,849		\$523	\$523	\$44,549
Week of July 11	\$829	\$4,148	\$32,678		\$2,266	\$2,789	\$46,815
Week of July 18	\$904	\$5,052	\$33,582		\$1,482	\$4,271	\$48,297
Week of July 25	\$10,330	\$15,382	\$43,912		\$0	\$4,271	\$48,297
Week of Aug 1	\$3,955	\$3,955	\$47,867		\$197	\$197	\$48,494
Week of Aug 8	\$1,542	\$5,497	\$49,409		\$0	\$197	\$48,494
Week of Aug 15	\$1,792	\$7,289	\$51,201		\$0	\$197	\$48,494
Week of Aug 22	\$1,007	\$8,296	\$52,208		\$0	\$197	\$48,494
Week of Aug 29	\$1,465	\$9,761	\$53,673		\$1,172	\$1,369	\$49,666
Week of Sept 5	\$2,362	\$2,362	\$56,035		\$2,461	\$2,461	\$52,127
Week of Sept 12	\$2,669	\$5,031	\$58,704		\$649	\$3,110	\$52,776
Week of Sept 19	\$18,263	\$23,294	\$76,967		\$197	\$3,307	\$52,973
Week of Sept 26	\$6,202	\$29,496	\$83,169		\$397	\$3,704	\$53,370
Week of Oct 3	\$4,458	\$4,458	\$87,626		\$0	\$0	\$53,370
Week of Oct 10	\$2,838	\$7,296	\$90,464		\$394	\$394	\$53,764
Week of Oct 17	\$2,019	\$9,315	\$92,483		\$99	\$493	\$53,863
Week of Oct 24	\$4,337	\$13,652	\$96,820		\$0	\$493	\$53,863
Week of Oct 31	\$2,667	\$2,667	\$99,487		\$492	\$492	\$54,355
Week of Nov 7	\$1,410	\$4,077	\$100,897		\$394	\$886	\$54,749
Week of Nov 14	\$3,087	\$7,164	\$103,984		\$99	\$985	\$54,848
Week of Nov 21	\$2,862	\$10,026	\$106,846		\$0	\$985	\$54,848
Week of Nov 28	\$6,497	\$16,523	\$113,344		\$590	\$1,575	\$55,438
Week of Dec 5	\$14,287	\$14,287	\$127,631		\$194	\$194	\$55,632
Week of Dec 12	\$7,885	\$22,172	\$135,516		\$97	\$291	\$55,729
Week of Dec 19	\$7,496	\$29,668	\$143,012		\$170	\$461	\$55,898
Week of Dec 26	\$4,551	\$34,219	\$147,562		\$194	\$655	\$56,092
Week of Jan 2	\$6,036	\$6,036	\$153,598		\$0	\$0	\$56,092
Week of Jan 9	\$2,567	\$8,603	\$156,165		\$226	\$226	\$56,318
TOTAL	\$156,165				\$56,318		
		Total:	\$212,484				



Otto Ruebsamen Daryl is good. I worked with him in 1 company where he took the almost dead company and automated a sales machine that's produced 40-70k a week for the past 5 years now. Saved that company while generating predictable cash flow the business was able to grow on and make payroll from every two weeks.



Love · Reply · 15w

↳ Daryl Urbanski replied · 2 Replies



Darren Veerapa Niiiiiiice!!! 1

Love · Reply · See Translation · 15w



Ed O'Keefe This is a great post Daryl Urbanski!!! Amazing work



Love · Reply · 15w

↳ Daryl Urbanski replied · 1 Reply

Amazon.ca Best Sellers: The most popular items in Marketing & Sales

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by Daryl Urbanski
Kindle Edition
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How I Made an Extra \$1,187.66 from a 4-Minute YouTube Video
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\$3,331.34
\$5,400.00
\$985.00
\$197.00
\$147.00
\$5,400.00
\$197.00
\$7,500.00
\$7,500.00
\$197.00
\$113,157.68



Daryl Urbanski

August 15, 2015 · 🌐



Check This Out:

Had an exciting phone call with a new client today. In 20 minutes I showed her \$113,157.68 in cold hard cash she didn't even know existed in her business or how she could get it.

Now, with 2 weeks of work (she will delegate) 10%-80% of it will be in her pocket and add 5%-15% NET PROFIT to her bottom line for every year her business exists from now on.

(pats self on back)

Needless to say, she was pretty happy about it.

I really need to start charging more.

📍 Tag Photo 📍 Add Location ✎ Edit

👍 55

20 Comments

👍 Like 💬 Comment ➦ Share

View 9 more comments



John Mignano cheers Daryl Urbanski 👍

Like · Reply · 2y



Sam Buckley Well done Daryl!



Write a comment...



CASE STUDY

Almost Bankrupt to \$1.6 MILLION USD in 9 Months with a Single Marketing Strategy.

Our case study for today is the **CEO** of a company that offers online personal development courses.

Catering to women who follow Deepak Chopra, the movie “The Secret,” and John Assaraf, he provides coaching on mindset, hypnosis, neuro-linguistic programming, and positive affirmations.

The company encountered a stumbling block: multiple attempts to launch a flagship product—a \$20/month mindset membership—had failed. They found themselves on the verge of bankruptcy.

The CEO and his team had to do everything in their power to save the business. Either they go big or they go home penniless and insecure.

Objectives

- Generate funds to keep the business moving forward.
- Launch products that sell.
- Market the brand.

What we did

- Established a standard lead generation and client acquisition process using a six-hour webinar.
- Harnessed the company's 50+ strategic partner promoters which earned the company approximately \$550,000 from about 600 orders.
- Sold \$997 one-time or \$397 three-time payment plan, with around 50 percent of sales going to the partners.
- Gave a Contact Us number and assigned two phone sales reps to take inbound calls.
- Placed outbound calls to anyone who hit the order form during the broadcast or clicked to see the order form from a post-event email but didn't purchase.

- Created split tests for each step of the process when the partners were promoting.
- Made A and B versions of registration pages, reminder emails, order forms—everything.
- Took the winning versions and then set them up to play as if live but on an automated basis.

- Set up the process to run from Sunday to Saturday each week, automatically.
- Ran the six-hour event on Saturdays.
- Sent multiple pieces of pre-event videos and homework materials via email to build excitement.

- Uploaded buyer emails to Facebook Ads and made a lookalike list.
- Created three ads with a \$500 budget and ran them on Facebook to the lookalike audience of our 550+ buyers to register for the event “happening this week”.

- Doubled the ad spending using the profit from the week before.

Results

- Earned \$1.6 million in front-end sales (excluding back-end products and services sold).
- Made \$7 million in sales in just under three years.
- Installed a massive income stream, including paid ads and customer service, requiring only three or four people to run it.
- Launched several other products under the new company brand.

Why it was smart to work with us

It might be hard to believe how they got back on their feet and earned millions. But Daryl's marketing strategy worked; this company is one of the many who swear by it.

🔊 Listen to Daryl's interview with Kent Martin about how they grew the business: <https://members.bestbusinesscoach.ca/inside-a-7-million-dollar-automated-funnel-building-up-to-over-300000-facebook-followers-from-scratch-with-kent-martin-2/>.



Special Series 10 of 10: Inside A \$7 Million Dollar Automated Funnel & Building Up To Over 300,000 Facebook Followers From Scratch - With Kent Martin

Today we are joined by a good friend and very special guest - Kent Martin. I first met Kent while working as Senior Marketing Director for J...



Goals:

- 1) \$6.5MM in revenue from automated online sales and conversion strategies (Stretch Goal of \$10MM)
- 2) Build a Lead Generation Machine For Sales Team - steady flow of quality leads with sufficient volume
- 3) Improved web presence / front end website(s)



Daryl Urbanski

#1 Bestselling Business Author, Business Coach,
Entrepreneur, & Student Of Life...

YOUR SUCCESS IS MY SUCCESS!

My mission is to create 200 new multi-millionaire
business owners. How? You'll do better when you
know better.



Join Our Mission



BestBusinessCoach[®]

"Your Success Is My Success" - Daryl Urbanski



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