



# **The Advisor PACT** **Monthly Session™**

July 12, 2016

Hosted by Mark Little

How much benefit do you want from today's session?

**Are you ready to be here  
and **no place else?****

- Max Dixon

This online meeting system technology uses lots of memory & system resources, so please...

- ✓ Close your **email** program
- ✓ Close all **browsers**
- ✓ Close **all programs** on your computer other than this GoToWebinar system

***Consider taking this attitude starting right now:***

**Something discussed today will be a significant positive **game-changer** for my business  
I want to focus so I don't miss it**





# Question

I have just hired a strong Administrative Manager to help me implement Truly Comprehensive Financial Services™.

How should I orient and train this new key Deliverables Team Member?



# **The** **Administrative Manager** **Briefing** **for** **Truly Comprehensive Financial Services™**

Hosted by Mark McKenna Little



**You realize this is a completely  
**new** business model?**

**That what we're discussing is a  
complete **transformation** of  
your business?**

# Traditional Financial Services Model

## Critical Questions:

- ✓ Who establishes the overall strategy
- ✓ Who provides oversight to ensure all recommendations are well-aligned with the overall strategy?
- ✓ Who's responsible for measuring success against the goals?



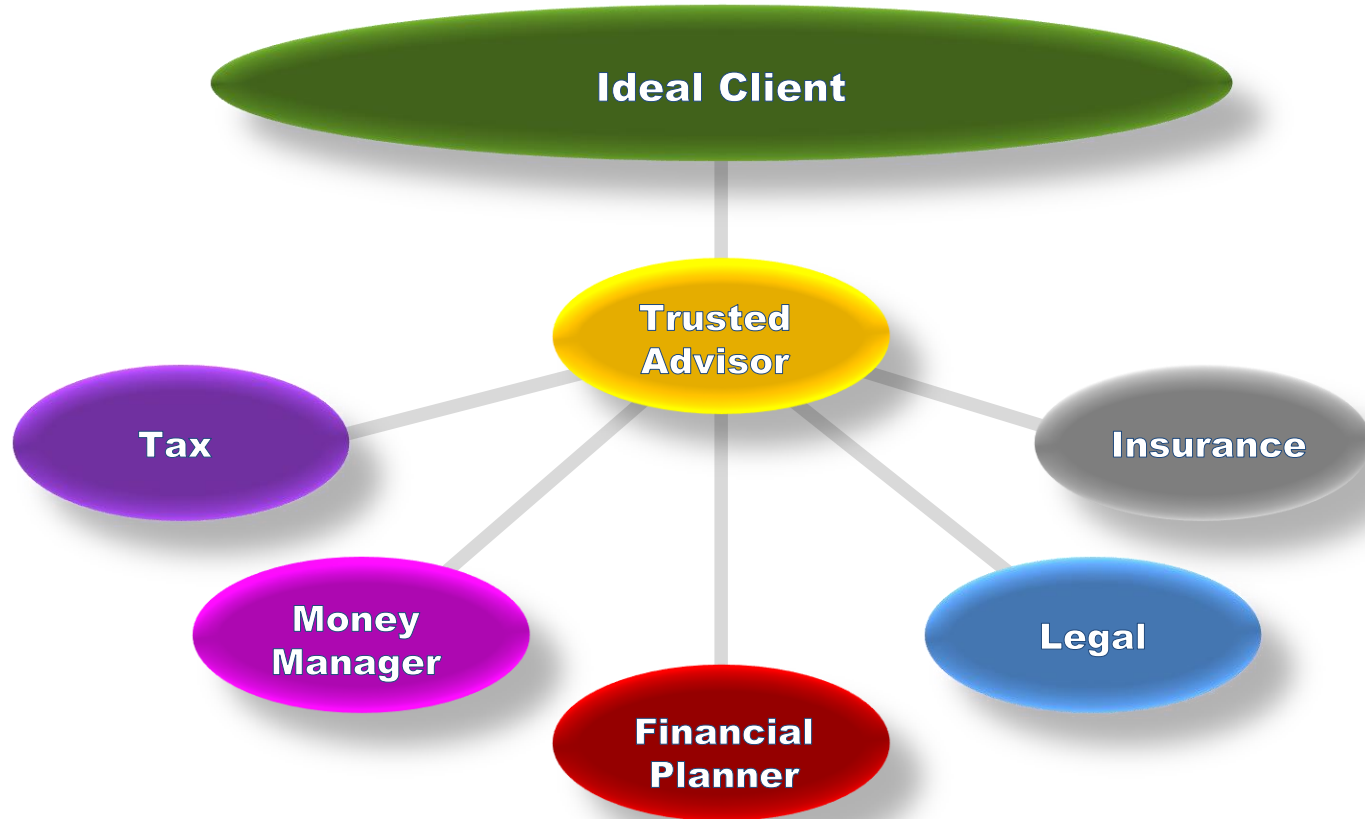




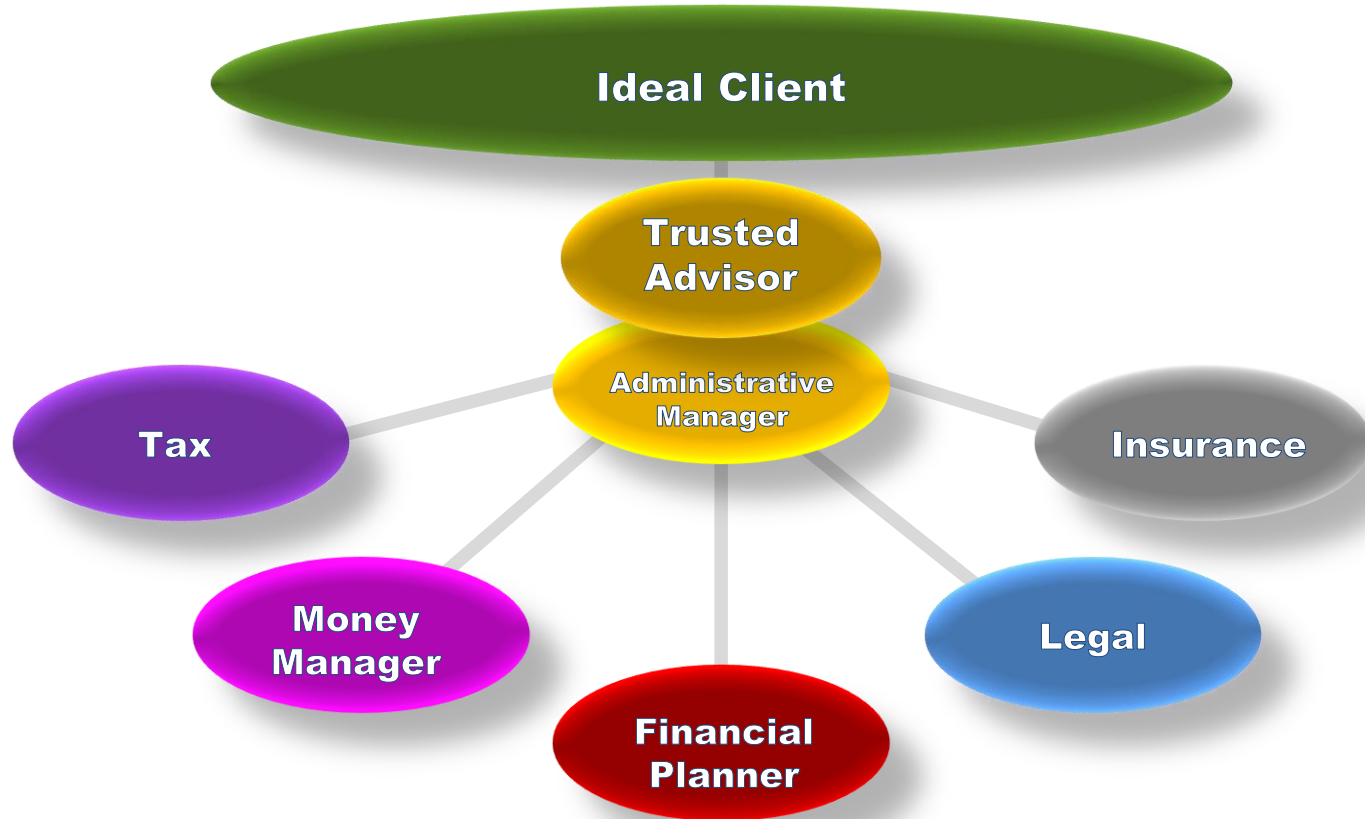




# Our Deliverables Team Structure



# Our Deliverables Team Structure



# The Ten Client Deliverables™

1

2

3

4

5

6

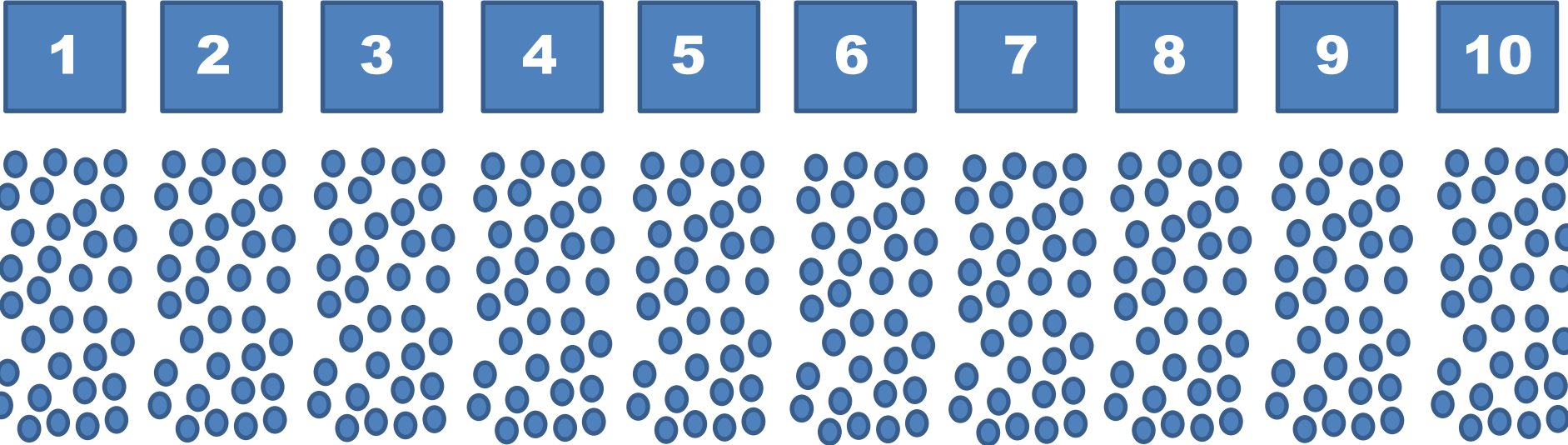
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8

9

10

# The Ten Client Deliverables™



# The Deliverables Checkpoints™

**RESULT:**

**The 3 Bottom-Line Client Outcomes**

**1**

**2**

**3**

**4**

**5**

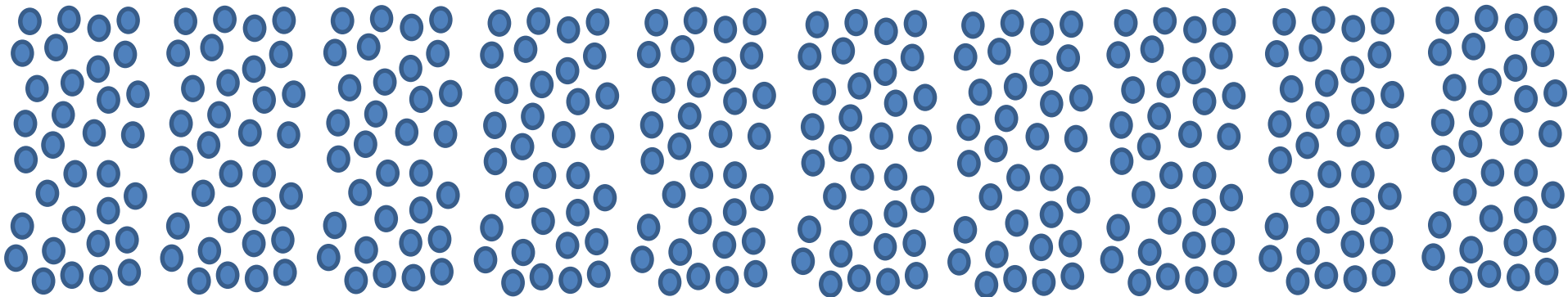
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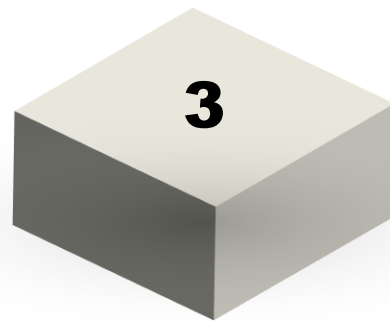
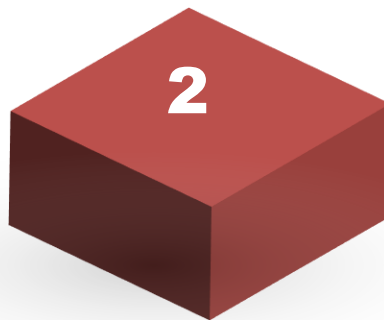
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**1**

**2**

**3**



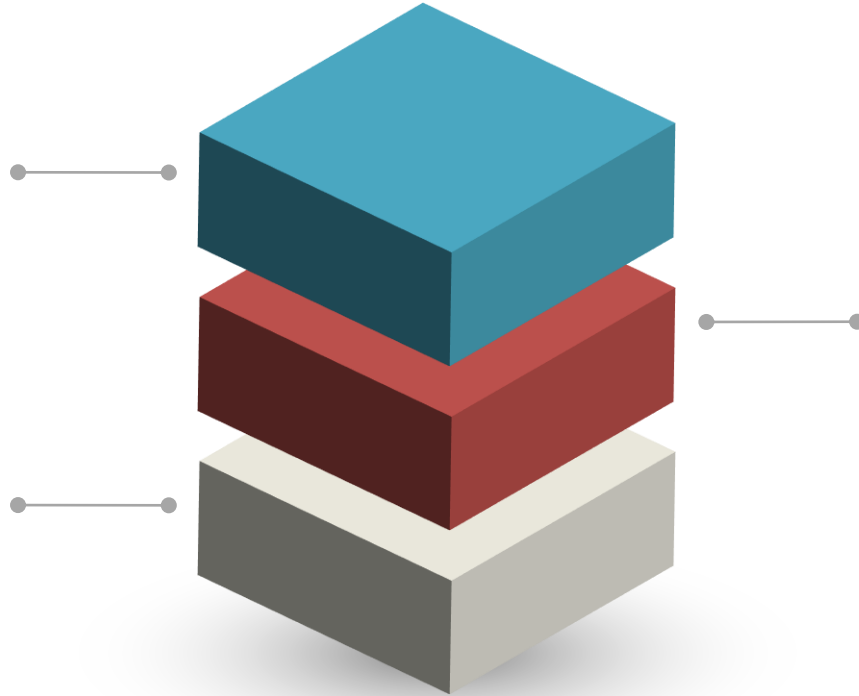
# The 3 Bottom-line Client Outcomes

Remain On-track  
To Goals

**Always** on-track to  
your goals

Make better  
financial decisions

Make **smart choices**  
about your money in  
all areas along the  
way



Proactive on  
financial issues

Take **Opportunities**  
No **Surprises**





# **Your Administrative Manager priorities**

**1. Serve your Existing Ideal Clients**

**2. Make Forward Progress Every Month  
Implementing Truly Comprehensive  
Financial Services™**

**(Work side-by-side with your Trusted Advisor  
transforming your business model)**

# Everyone On The Team Has Their **Unique** Responsibilities



# Administrative Manager

## Skills we're seeking...

- ✓ Leadership Skills
- ✓ Analytical Aptitude
- ✓ Attention to detail
- ✓ Ability to prioritize

(You document & prioritize your commitments)

- ✓ Proactive
- ✓ Resourceful
- ✓ Self-disciplined
- ✓ Reliable



# For the Administrative Manager there is **NOTHING** more important than implementing Truly Comprehensive Financial Services™

- ✓ Ideal Clients will be paying the **lion share** of revenue
- ✓ Ideal Clients **deserve** to be the highest priority
- ✓ Therefore implementing The Toolkit is the **highest** priority item on your Administrative Manager's plate
- ✓ **No other task** has a higher priority than delivering on the promises made to Ideal Clients
- ✓ Must **reprioritize** your AM's duties to allow for this



# Next Steps as Administrative Manager

- ✓ Complete The Annual Recurring Revenue Exercise™ (**The ARR**)
- ✓ Establish a brief **status-update check-in** between AM & TA to discuss progress implementing Truly Comprehensive Financial Services™  
(we recommend **daily** for less than 15 minutes)
- ✓ Update The Annual Recurring Revenue Exercise™ **daily** (Potential-Client Interaction Time™ Tracking)
- ✓ Hold TA accountable for...
  - ✓ Completing **The Ideal Client Profile** (ICP)
  - ✓ Establish your Predictable Minimum Annual Recurring Revenue (**PMARR**)
- ✓ Acquire **5 Subject Matter Experts** (Financial Planning, Tax, Estate, Money Management, & Insurance)
- ✓ Finalize your SME's **Deliverables Checkpoints**™ for The Ten Client Deliverables™
- ✓ Implement **The Three Meeting Process**™
- ✓ Document your process for each meeting using **The Best Way**™ method

# **Administrative Manager Responsibilities**

**Ensure that The Monthly Project™ provided by The Advisor P.A.C.T. Monthly Program™ is fully implemented in less than 60 days.**

- 1. *Within 24 hours of receipt:*** Create a **timeline**, with week-by-week objectives, for implementing The Monthly Project™ in less than 60 days
- 2. *Conduct daily status-update check-in:*** Provide your Trusted Advisor with a daily **status update** regarding the progress for completing The Monthly Project™ (report daily: on-track, off-track, etc)
- 3. *Submit Questions to The Advisor P.A.C.T. Monthly Session:*** When you need direction, **submit questions** more than 24-hour prior to the webinar