ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

October 17, 2017

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

Your ADVISOR PACT Pledge

PROTECTION
ATTENTION
COORDINATION
TRANSPARENCY

To every Ideal Client

October 17, 2017

ADVISOR PACT

Goal

Deliver Truly Comprehensive
Financial Services™

in a way that **exceeds** Ideal
Client **Expectations**

Outcome

A minimum of

5 Initial Client Interviews™

per week

resulting from spontaneous

unsolicited client referrals

ADVISOR PACT

Vision and Goals | Make 2017 Your Best Year Ever!
Annual Recurring Revenue Exercise
Potential Client Interaction Time
The Role of the Administrative Manager
Hiring an Extraordinary Administrative Manager
The Deliverables Team Recruitment Process
Evaluating Your Deliverables Team
The Ten Client Deliverables, Course 1 of 2
The Ten Client Deliverables, Course 2 of 2
The First 104 Days of a New Client Relationship
Setting Your Compensation
The Hero's Journey
Manage portlets

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The Monthly Project™

Vision and Goals | Make 2017 Your Best Year Ever!
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As you implement the projects we send you every month…

This Q&A session allows you to ask questions & get live coaching

https://advisorpact.com/modules/setting-your-compensation

Issues

- ✓ Could you please walk me through the first exercises in this program, I'd like to get the big picture for what I'll be working on?

- ✓ I've completed The Deliverables Team Recruitment Process™ module and we've just acquired our first Subject Matter Expert (SME). I heard you say once that there are 17 action items for new SMEs that need to be completed within the first 30 days. Is that right? What are the 17 things that I need to get done after our SME is on the team?

Question

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Develop a specialized list of existing and potential clients that will guide you step-by-step through building your Ideal Client Community.
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Potential Client Interaction Time

Learn why the most important number to track is the amount of time you spend interacting with potential clients, and begin tracking your PCI Time immediately.
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Your Administrative Manager is not an administrative support person—they are the Project Leader.
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I heard you say once that there are 17 action items for new SMEs that need to be completed within the first 30 days.

Is that right?

What are the 17 things that I need to get done after our SME is on the team?

An SME's First 30 Days: The 17-Point SME On-boarding Checklist

Simple checklist when acquiring a new Subject Matter Expert

The Trusted Advisor Toolkit™

Onboarding Checklist

For a New Subject Matter Expert (SME)

The checklist of action items for every new SME

SME Name

SME Role

Date this Checklist was started

Action Item	Proposed Team Member Assigned	Actual Team Member Assigned	Date Completed/ Updated*
SME Introduced to AM as Project Leader/ Coordinator	TA		
SME Orientation (of The Toolkit)	AM		
SME Agreement Form (companion to SME "Getting Started" video)	AM		
SME has sumbitted TBW processes for all 5 CPMs (due w/in first 30-days)	AM		
Most recent SME Commitment Assessment Form	TA		
Most recent SME Key Performance Measures Form	TA		
The Team Goal			
Aware/Understands The Team Goal	TA		
Accepted/Embraced The Team Goal	TA		
Contributing to The Team Goal (scale of 1-10)	TA		
Evidence this SME is capable of exceeding an IC's expectations (Y/N)	TA		
The Initial Team Exercises For Improving The Client Experience			
This SME has completed Exercise 1of4	TA		
This SME has completed Exercise 2of4	TA		
This SME has completed Exercise 3of4	TA		
This SME has completed Exercise 4of4	TA		
SME Expectations Conversation (One scheduled every 4-months)			
Conversation 1 of 3 for Year:	TA		
Conversation 2 of 3 for Year:	TA		
Conversation 3 of 3 for Year:	TA		

*For each cell, note the date each checklist action item was completed or updated.
Empty Cells represent "items still needed"

TA: Trusted Advisor (Team Leader)
AM Administrative Manager (Team Coordinator/Project Leader)
SME: Subject Matter Expert (Person with skill and expertise in a narrow field of finance)
TBW: The Best Way™ method for documenting a process
CPM client progress meeting

Download Fillable PDF Checklist

The Ideal Advisor Profile for The Advisor P.A.C.T. Monthly Program™

This program is best suited for a financial advisor who,

- ✓ Likes the idea of doing a "whole lot more" for a "whole lot fewer" Ideal Clients who pay significantly higher compensation for the unprecedented level of services provided.
- ✓ Is committed to implementing Truly Comprehensive Financial Services™ at some point in the future, and as quickly as possible.
- ✓ Recognizes the wisdom of delivering Comprehensive Financial Services through a skilled team of Subject Matter Experts (Tax, financial planning, tax, estate planning, & insurance)... rather than serving as a one-man-band.
- ✓ Is willing to make the effort to implement this new business model to fill the gap in the marketplace created by financial advisors, and a financial services industry, unable or unwilling to provide Ideal Clients the Comprehensive Financial Services they desire.