

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



To every Ideal Client



Goal Deliver Truly Comprehensive Financial Services™

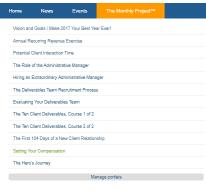
in a way that **exceeds** Ideal Client **Expectations**

Outcome A minimum of 5 Initial Client InterviewsTM per week

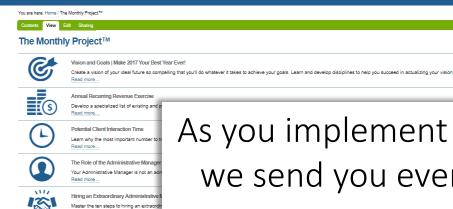
resulting from spontaneous

unsolicited client referrals

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The Deliverables Team Recruitment Pro Hire your next Deliverables Team member

Evaluating Your Deliverables Team Learn the process for evaluating each of

The Ten Client Deliverables, Course 1

When you provide The Ten Client Deliver

The Ten Client Deliverables, Course 2 of When you provide The Ten Client Deliver

The First 104 Days of a New Client Rela Learn how to get off on the right foot with

Read more...

Read more..

Read more...

As you implement the projects we send you every month...

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



Setting Your Compensation

A new model for delivering financial services requires a new method of compensation. Learn how you'll get paid, and what you'll get paid to do under this new model.



The Hero's Journey

What do you have in common with Obi-Wan Kenobi? In this course, Mark walks you through how your path to becoming indispensable mirrors the classic Hero's Journey story structure

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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Create a vision of your ideal future so compelling that you'll do whatever it takes to achieve your goals. Learn and develop disciplines to help you succeed in actualizing your vision.

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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.

Read more...



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.

Read more...



The Role of the Administrative Manager

Your Administrative Manager is not an administrative support person—they are the Project Leader.

Read more...



Hiring an Extraordinary Administrative Manager

Master the ten steps to hiring an extraordinary Administrative Manager who will serve as the Project Leader for you and your team.

Read more...



The Deliverables Team Recruitment Process

Acquire your next Deliverables Team member in 12 simple steps.



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Learn the process for evaluating each of your direct reports every 4 months in an effort to improve your client experience.

Read more...



When you provide The Ten Client Deliverables to your clients, you are providing Truly Comprehensive Financial Services.

Read more...



The Ten Client Deliverables, Course 2 of 2

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The First 104 Days of a New Client Relationship

Learn how to get off on the right foot with every new Ideal Client relationship, and what you and your team should be doing during the first 104 days.

Read more...



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

Simple checklist when acquiring a new Subject Matter Expert

For a New Subject	g Chec ct Matter	r Expert (SME)	
The Trusted			
AdvisorToolki** The checklist of action	n items for	every new SME	
SME Name			
SME Role			
Date this Checklist was sta	rted		
Action Item	Proposed	Actual Team Member	Date
	Tean Henber	Assigned	Completed/ Updated*
SME Introduced to AM as	Assigned TA		
Project Leader/ Coordinator SME Orientation (of The Toolkit)	MA		
SME Agreement Form (companion to	AM		
SME "Getting Started" video) SME has sumbitted TBW processes for all	AM		
5 CPMs (due w/in first 30-days)			
Most recent SME Commitment Assessment Form	TA		
Most recent	TA		
SME Key Performance Measures Form The Team Goal			
Aware/Understands The Team Goal	TA		
Accepted/Embraced The Team Goal	TA		
Contributing to The Team Goal	TA		
Evidence this SME is capable of	TA		
exceeding an IC's expectations [Y/N] The Initial Team Exercises			
For Improving The Client Experience			
This SME has completed Exercise 1of4 This SME has completed Exercise 2of4	TA 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: Conversation 3 of 3 for Year:	TA		



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.