



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

December 12, 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

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

What should
The Annual Referral RateTM (TARR)
be?

The Annual Referral Rate (TARR)

Total number of **Ideal Client referrals** over the past 12 months

÷

Total **number** of Ideal Clients

=

The **Annual** Referral Rate (TARR)

Implementation Progress v. The Annual Referral Rate™ (TARR)

Comparing

The Annual Referral Rate™

against

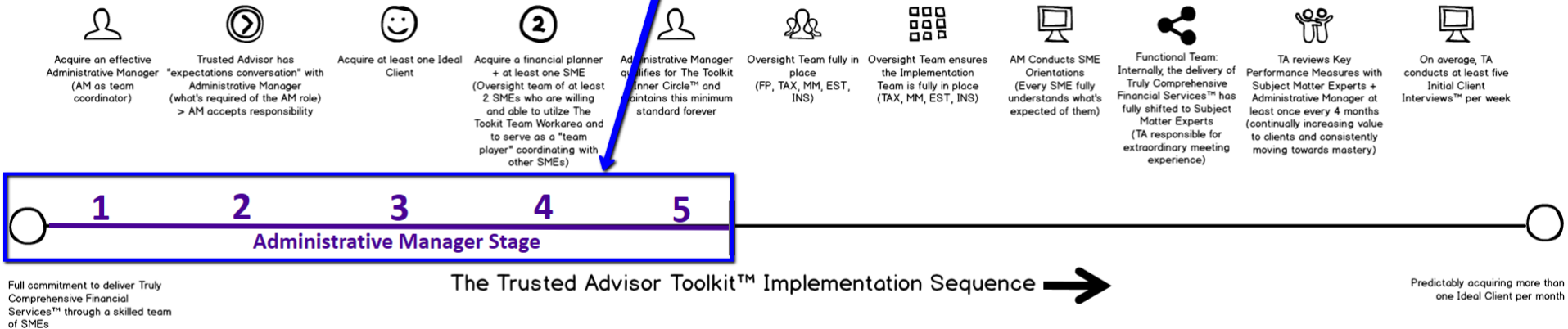
your implementation progress
will give you the answer



Truly Comprehensive Financial Services™ has **11 Implementation Steps**

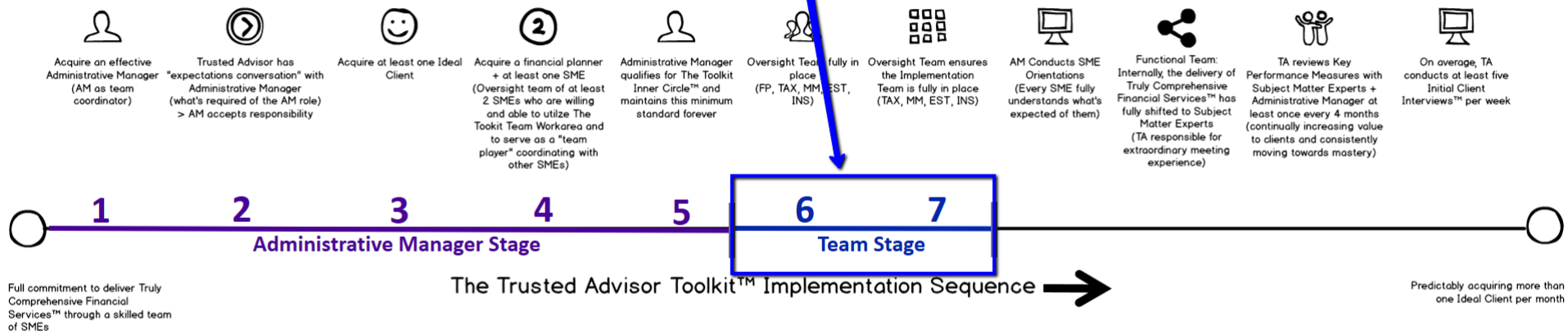
The Administrative Manager Stage

Stage 1 of 3



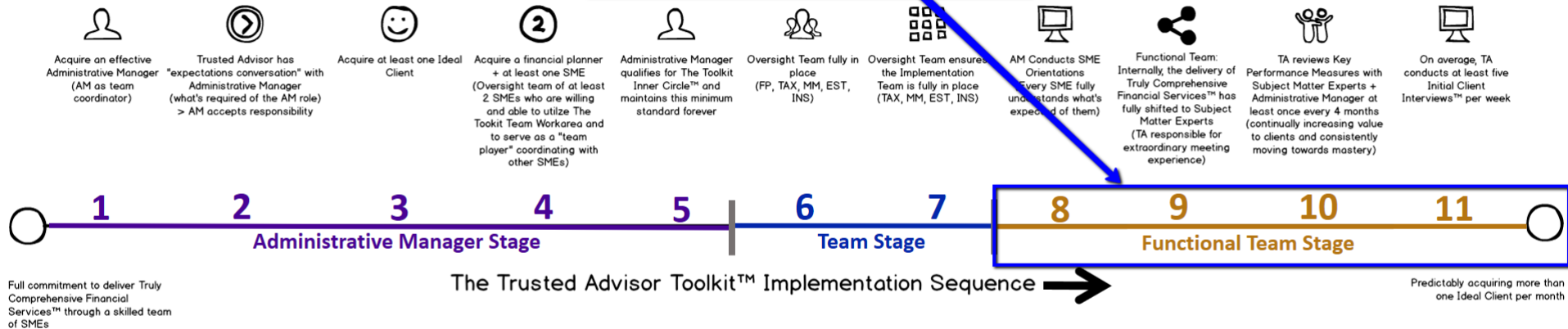
The Team Stage

Stage 2 of 3

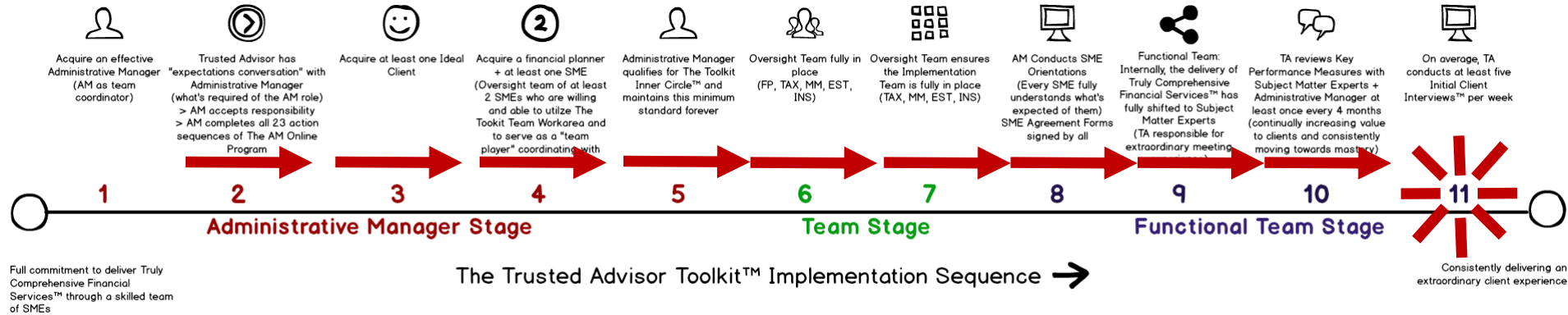


The **Functional** Team Stage

Stage 3 of 3



Achieve One Step Every 30-60 Days



Implementation Progress v. The Annual Referral Rate™ (TARR)

How do you know
if your team is implementing
Truly Comprehensive Financial Services™
effectively enough?

Implementation Progress v. The Annual Referral Rate™ (TARR)

An **Increasing** Annual Referral Rate

Is confirmation that you're implementing **effectively**

Implementation Progress v. The Annual Referral Rate™ (TARR)

Effective forward implementation is accompanied by

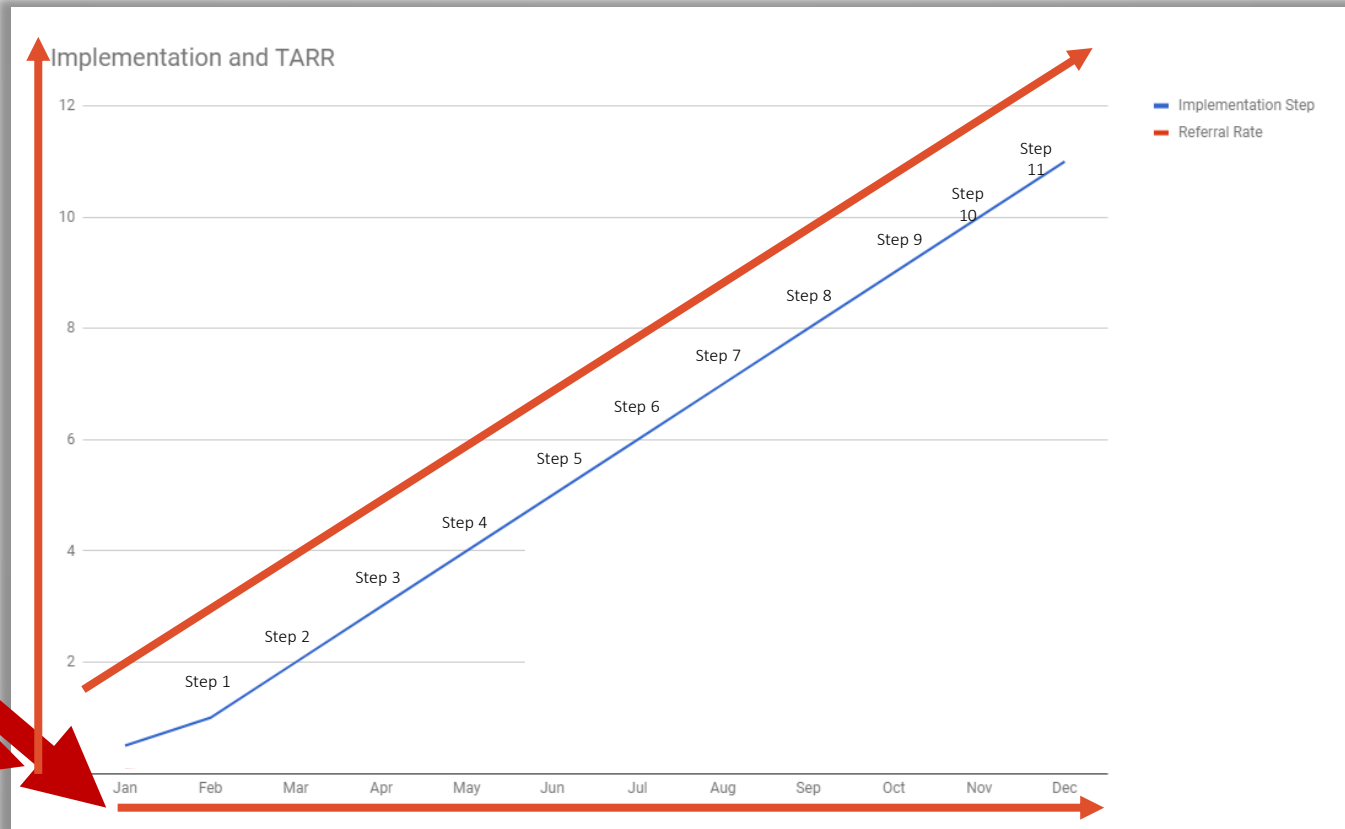
an **Increasing** Annual Referral Rate

If The Annual Referral Rate™ is **not** increasing as you make forward progress you...

1. **May Be Implementing Too Quickly:** faster than your team can figure out how to impress clients
2. **May Need to Implement More Carefully:** Elements of our training have been skipped or have not been fully implemented

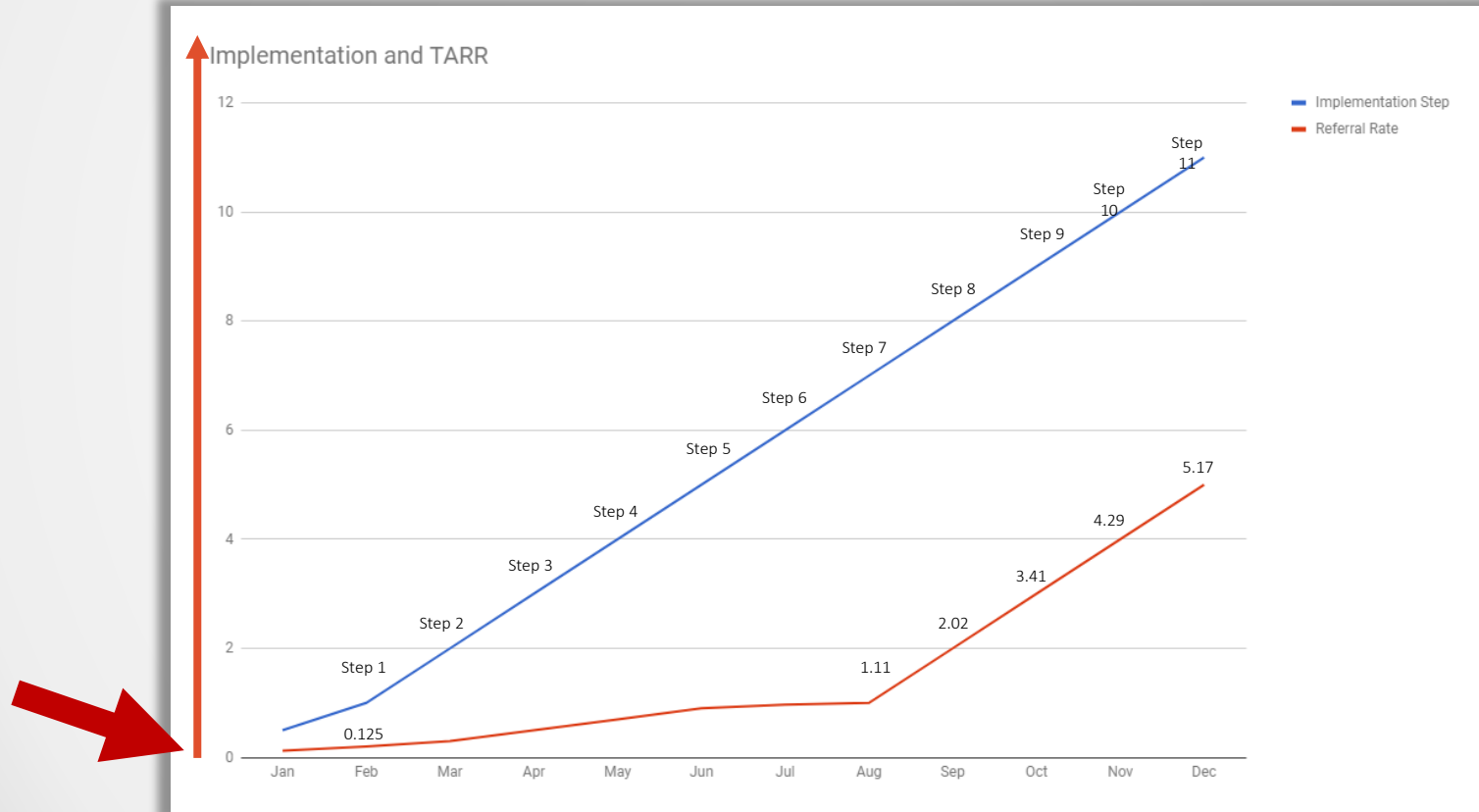
Implementation Progress v. The Annual Referral Rate™ (TARR)

Positive Correlation



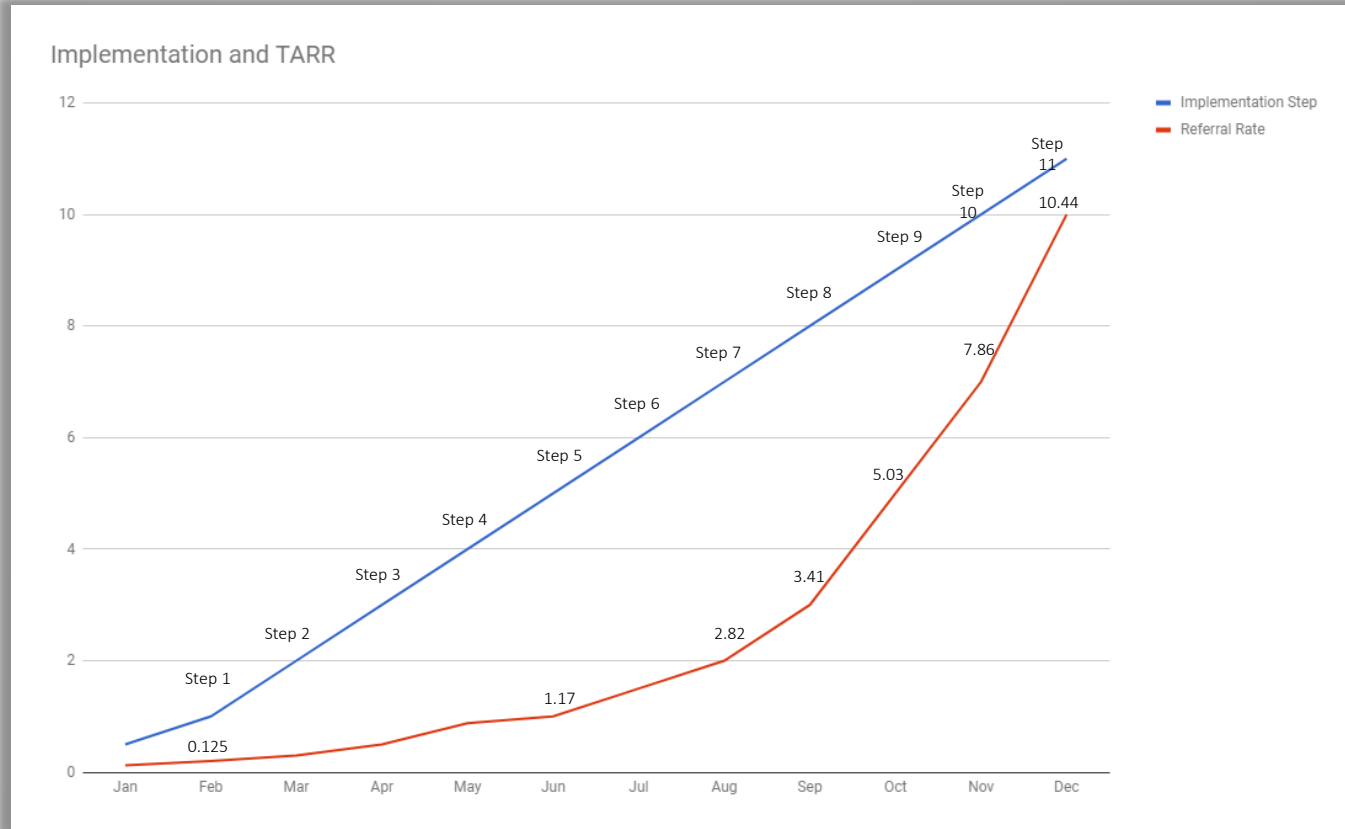
Implementation Progress v. The Annual Referral Rate™ (TARR)

Low Positive Correlation (increase team energy)



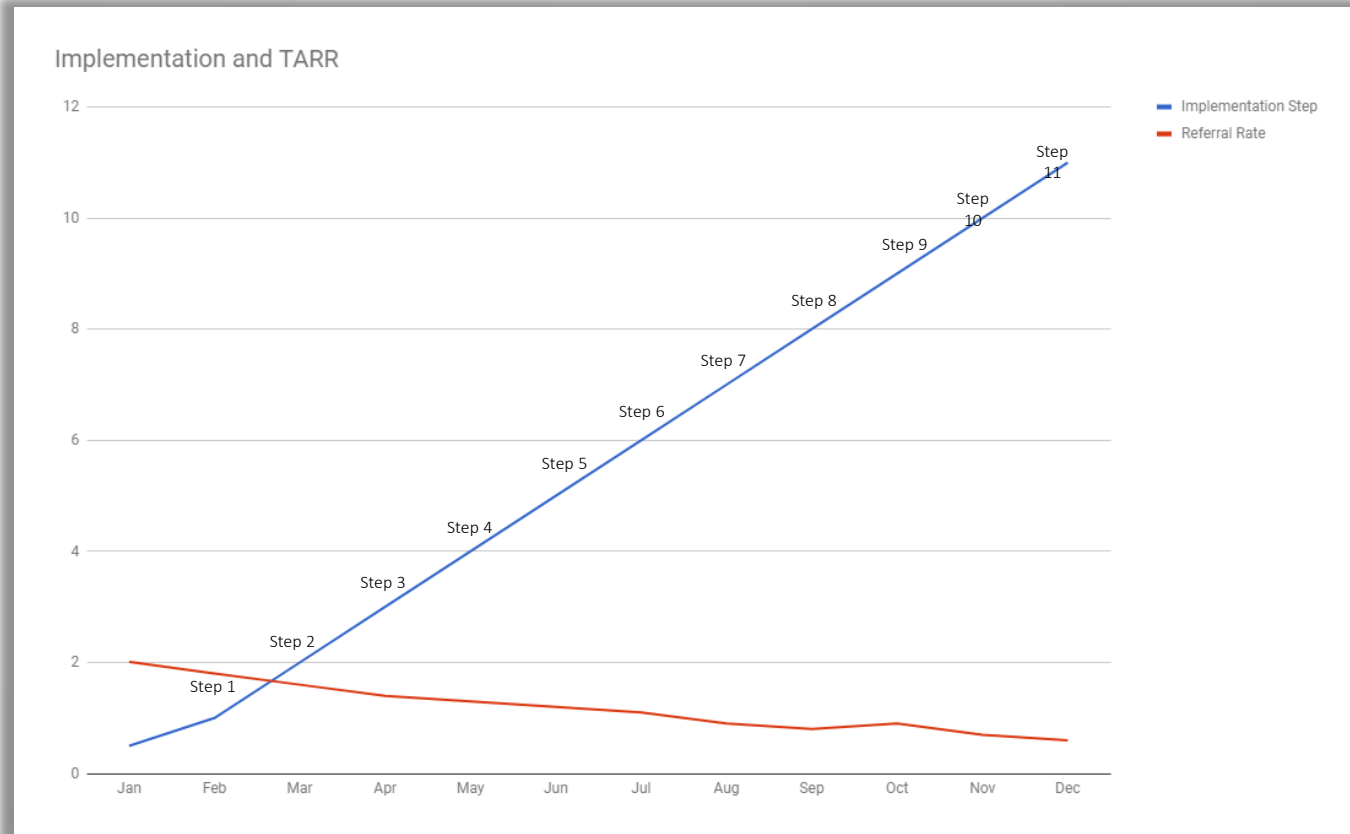
Implementation Progress v. The Annual Referral Rate™ (TARR)

High Positive Correlation (success)



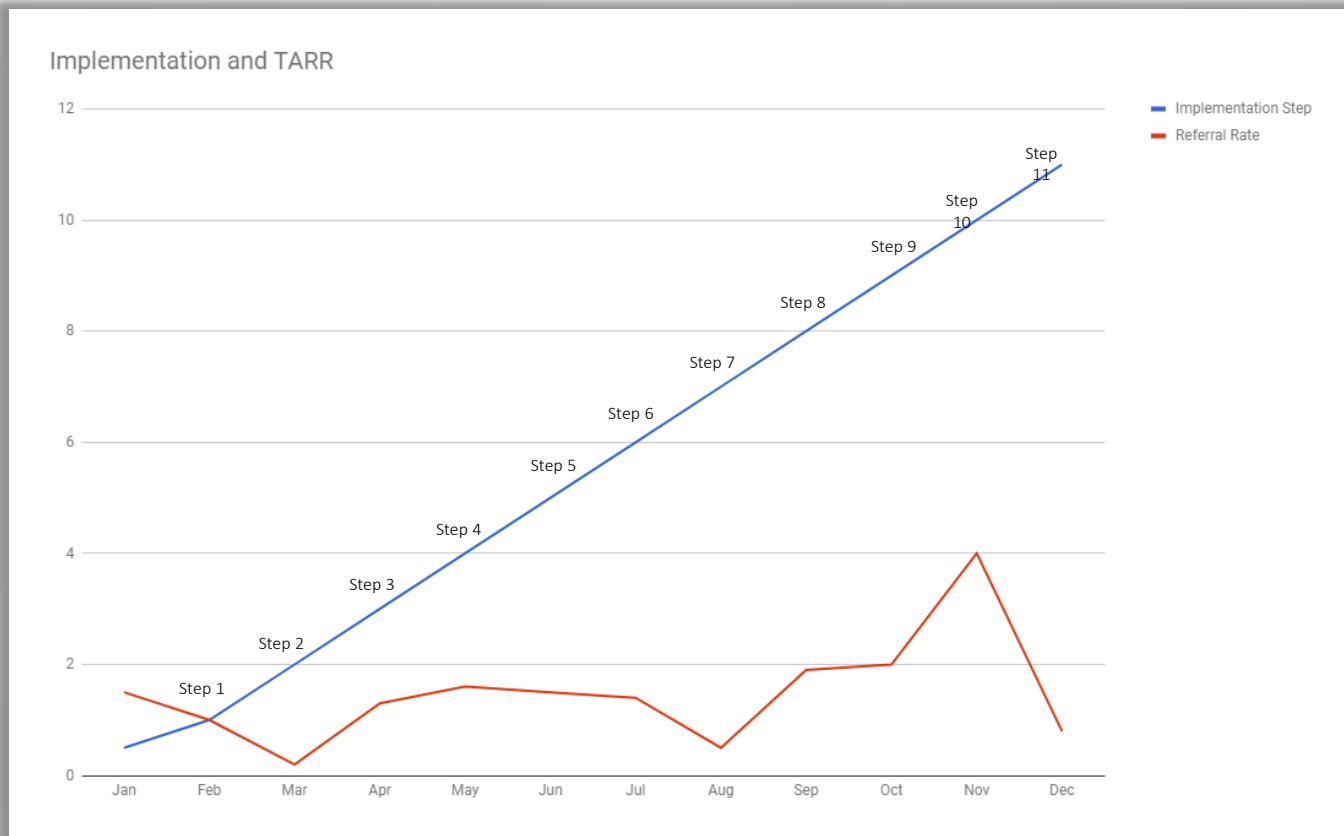
Implementation Progress v. The Annual Referral Rate™ (TARR)

Negative Correlation (failure)



Implementation Progress v. The Annual Referral Rate™ (TARR)

No Correlation (aimless)



Implementation Progress v. The Annual Referral Rate™ (TARR)

The 4 Scenarios of implementation effectiveness

Correlation between your forward progress and TARR

1. **High Positive Correlation:** Success
2. **Low Positive Correlation:** Increase Team Energy
3. **Negative Correlation:** Failure
4. **No Correlation:** Aimless

Implementation Progress v. The Annual Referral Rate™ (TARR)

Your Referral Rate **Targets**

- ✓ Implementation Step 1: TARR = 0.? (baseline)
- ✓ By Implementation Step 5 : TARR = 1+
- ✓ By Implementation Step 7 : TARR = 2+
- ✓ By Implementation Step 8 : TARR = 3+
- ✓ By Implementation Step 9 : TARR = 5+
- ✓ By Implementation Step 10: TARR = 7+
- ✓ By Implementation Step 11: Explore Your team's skill level. See what your team is capable of achieving*

*We've seen TARR as high as 15

The Team Goal

- ✓ We will deliver Truly Comprehensive Financial Services™ to every Ideal Client in a manner which exceeds **their** expectations
- ✓ The most direct measure of success of The Team Goal is an **increasing** Annual Referral Rate™ (TARR)
- ✓ We will have achieved The Team Goal when we are consistently experiencing five (5) Initial Client Interviews™ per week attributable to spontaneous **unsolicited** client referrals

Implementation Progress v. The Annual Referral Rate™ (TARR)

To Improve...

Assess every SME **individually**

Question on the table, one-on-one, with each SME:

*“**How** is this SME
contributing to The Team Goal?”*

Is there evidence this SME is contributing to The Team Goal?



Yes, this SME is contributing to The Team Goal

- ✓ This SME is an **example** to the others
- ✓ Enlist this SME to **inspire** the others
- ✓ Use evidence from this SME to brainstorm **ideas** for the other SMEs

**This SME is Capable of
Exceeding Ideal Clients' Expectations**

Is there evidence this SME is contributing to The Team Goal?



No, this SME is not contributing to The Team Goal

- ✓ SME is willing to invest the **time** required to fill this skill gap
- ✓ If a team member is unable to contribute to The Team Goal, **why** be on the team?

This SME is **Not Yet Capable of Exceeding Ideal Clients' Expectations**

As leader it's your role to insist that **every** member of your team is contributing to The Team Goal (otherwise **why** are they on the team?"

So which situation are you in currently?

“As we implement Truly Comprehensive Financial Services™...

- ✓ “TARR is increasing **rapidly** as we implement”
- ✓ “TARR is increasing as we implement, but our team’s skill is capable of **more**”
- ✓ “TARR is **declining** as we implement”
- ✓ “As we make forward progress implementing, movements in TARR seem to have **no connection**”