ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

May 15, 2018

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

Lots of responses about *this* question in The Monthly Session™ from April

- ✓ I understand that this is not a client acquisition focus, however I found you through Bill Bachrach's program and Bill highlighted how Mark acquired his clients by literally talking to hundreds of prospective clients.

- ✓ If possible can Mark spend a moment in a future call to address how he was so successful and how did he find so many people who were willing to talk to him and deliver the roadmap discussion??

Mark’s Client Acquisition Process

- ✓ **Marketing 101 Project**
  - Invested 3 of 5 days/week out of the office (figured my potential clients aren’t “in my office”)
  - Meeting people (just be a nice person)
    - Met with every new person at least twice
    - Never talked about my business (unless asked)
    - Simply identified those who meet my Ideal Client Profile
  - OBJECTIVES:
    - Build my reputation
    - Marketing 101: Most people don’t even know who I am or what I do

Mark's Client Acquisition Process

- ✓ **The Strategy That Works**
  - **Focused exclusively on this statistic: For every 7.8 Initial Client Interviews™ I acquired ONE (1) Ideal Client.**
  - **Therefore**
    - **I focused on people I met who happened to meet also my Ideal Client Profile: Always "of service"…**
    - **Just "be a nice person"**
    - **Never initiated conversation about The Initial Client Interview™, but asked who they knew who might meet my Ideal Client Profile (I'm building a list)**
    - **I made sure I was "fishing in the right ponds"**
    - **Focused attention on people who had "money events" … offered The Initial Client Interview™ if they were actively interested (asked me money questions)**
  - **Results in numbers**
    - **Conducted 648 Initial Client Interviews™ from Jan 2000 – Oct 2002 (Goal: 5/week)**
    - **Acquired 83 Ideal Clients in 34 months**
    - **Average: Acquired 2.44 Ideal Clients per month**
    - **No Financial Advisor yet has beat this Ideal Client Acquisition record**

You have a unique opportunity
to get exactly what you need right now

The Mark Of Mastery™

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ARTICLES | COURSES

Hi Mark! Faves & Profile

Financial Advisor Training Referability Find Out More

Getting Started

with The Mark Of Mastery™

We're so glad to see you here! Click the button below for an overview of what you'll find inside The Mark Of Mastery™

Read more...

Search this website ...

Find out more about Referability

Ready to take your client experience to the next level? Learn more about our Referability program.

Discover Referability

How I Acquired 1,242 Clients – New Course Coming Soon

MARCH 7, 2018 BY MARK LITTLE

FILED UNDER: ACQUIRING CLIENTS

TAGGED WITH: UPCOMING COURSES

Share | Tweet | Share

As you may know, we are about to launch a new course for financi
question we receive from our members:

**"How did a single advisor ever acquire 1,242 clients? What spe
acquire that many clients?"**

Ultimately, I transformed my business and now deal with a small c
Nevertheless, the time has come to document all of the specific m
clients. But I could use your help.

While I'm putting the finishing touches on this material over the ne

Ask Me Anything

Let me know: What are you struggling with? What questions would you like answered from a Financial Advisor who's actually done it? What stands in the way of you adding more clients quickly?

What would you most like to know from a financial advisor who's acquired more than 1,500 new clients over the past 30 years? What questions do you have for someone who politely disengaged from more than 1,225 Non-Ideal Clients in order to focus only on Ideal Clients? What aspects of the Client Acquisition process have you never seen discussed and want to know more about?

Comment below with your top two questions about client acquisition, and I'll work them into the course. It's okay if you need some time to think about it—just bookmark this page, and come back when a client acquisition question pops into your mind.

So: **What are your two top questions about Client Acquisition that we absolutely NEED to answer in our new course?**

— LEAVE A COMMENT

Leave a Reply

Logged in as Mark Oliver. Log out?

Comment

You have an opportunity to drive the content in this course

- ✓ Should I give a potential client my complete list of services?
- ✓ Is it smart to provide a list of all my Deliverables Checkpoints™?

No

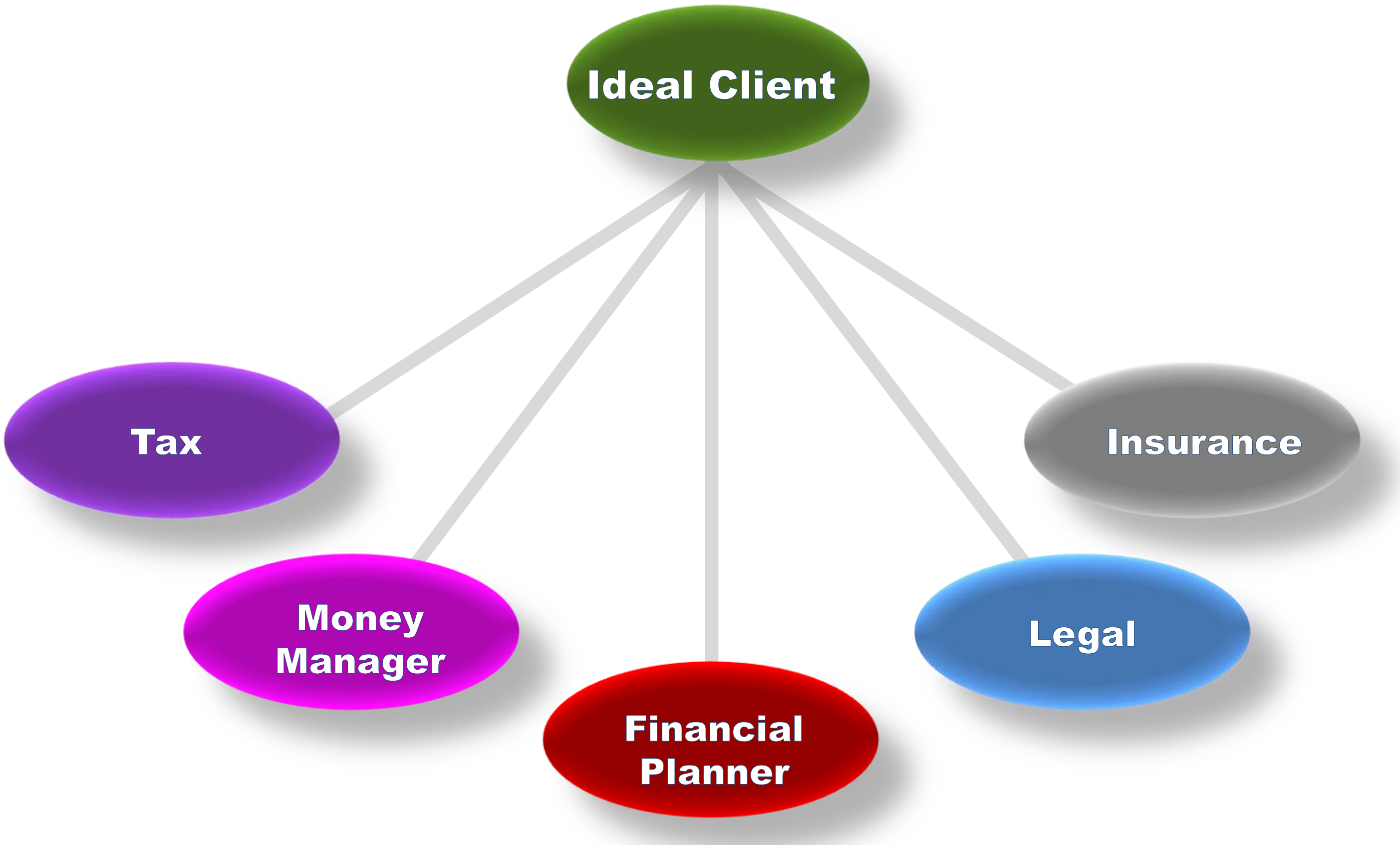
I usually give potential clients only 3 graphics

(and only to support my answers to their questions)

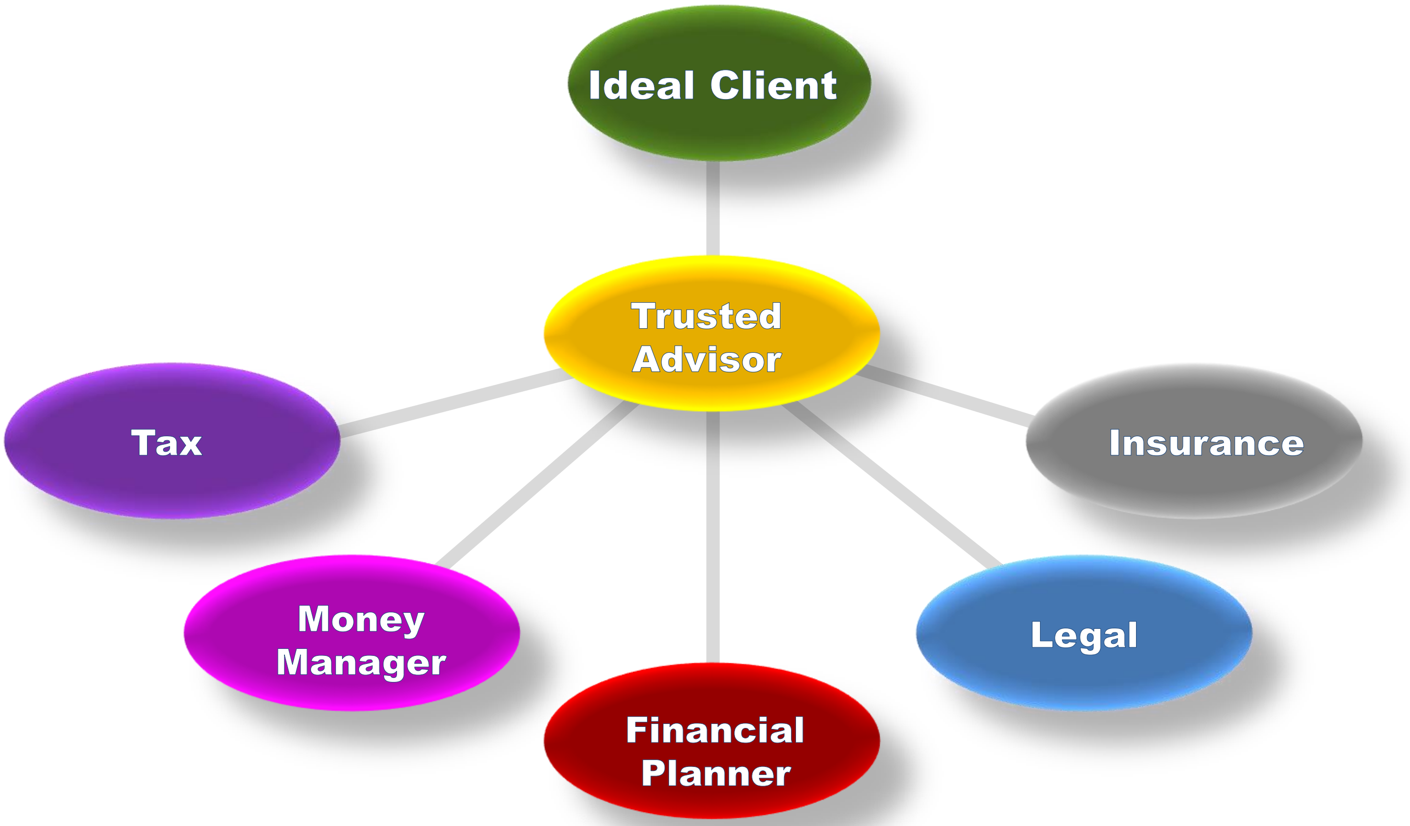
3 graphics

1. Ideal Client Profile
2. The Ten Client Deliverables™
3. Our Team Structure

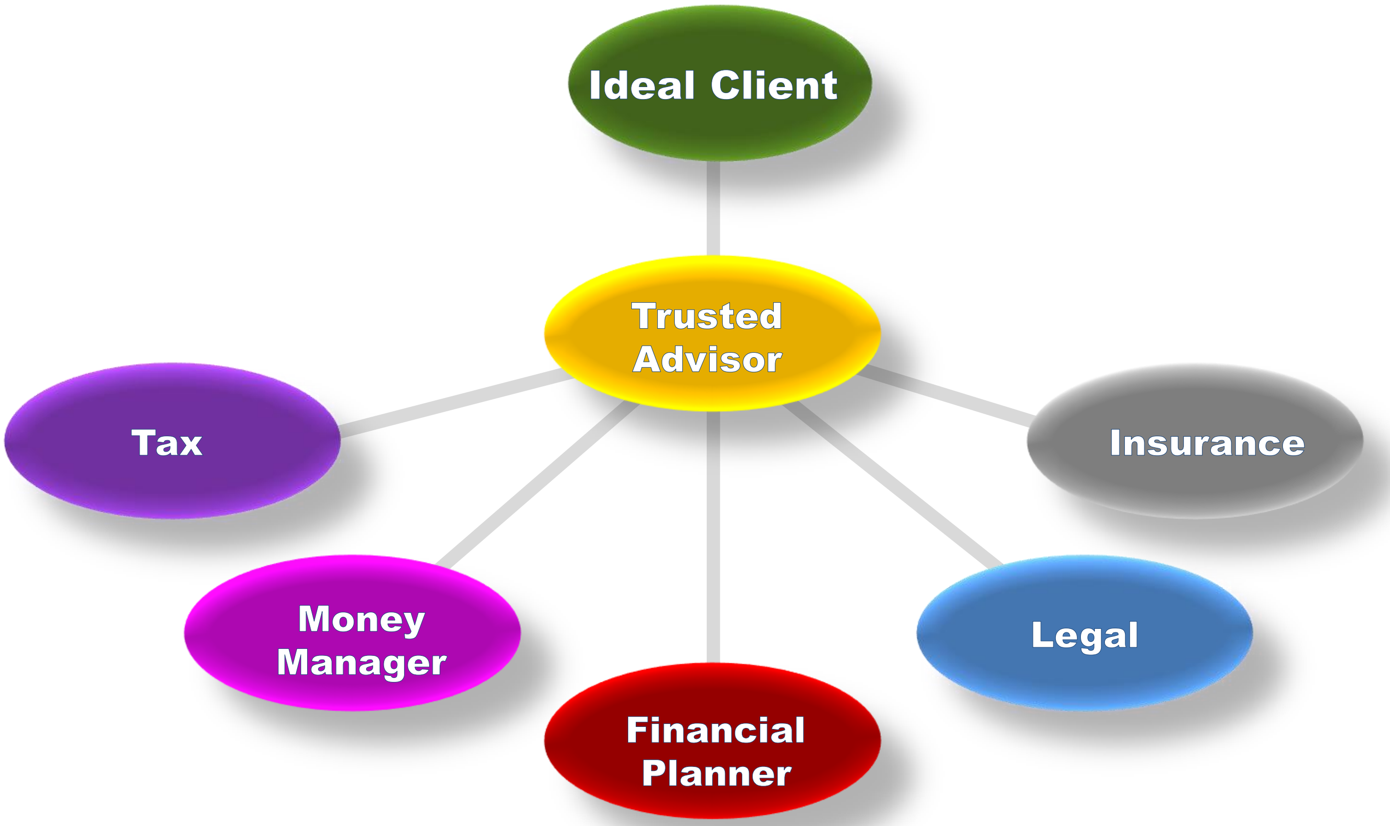
Before


Ideal Client
Tax
Money Manager
Financial Planner
Legal
Insurance

After


Ideal Client
Trusted Advisor
Tax
Insurance
Money Manager
Legal
Financial Planner

Our Oversight Team



3 graphics

1. Ideal Client Profile
2. The Ten Client Deliverables™
3. Our Team Structure

The Monthly Project™

The Essential Concepts Of Advisor PACT

In this 9-part audio series, Mark McKenna Little and Ian F. Hood reveal a profoundly different perspective on 9 essential topics including: client acquisition, client retention, what clients really want from "The Client Experience" and how to align your business with what you and your clients really care about.
Read more...

Vision and Goals | Make 2018 Your Best Year Ever!

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.
Read more...

Annual Recurring Revenue Exercise

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.
Read more...

Evaluating Your Deliverables Team

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

The Ten Client Deliverables, Course 1 of 2

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...

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.
Read more...

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.
Read more...

The Extraordinary Client Experience

While the entire Advisor P.A.C.T.™ Monthly program is designed to help you deliver an extraordinary client experience, this module will dive into some simple ways you can start moving in that direction right away.
Read more...

The Annual Referral Rate and Referability Dashboard

By exceeding client expectations, you can increase the quantity and quality of referrals you receive.
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✓ I have one Subject Matter Expert and we want to increase client referrals, but…

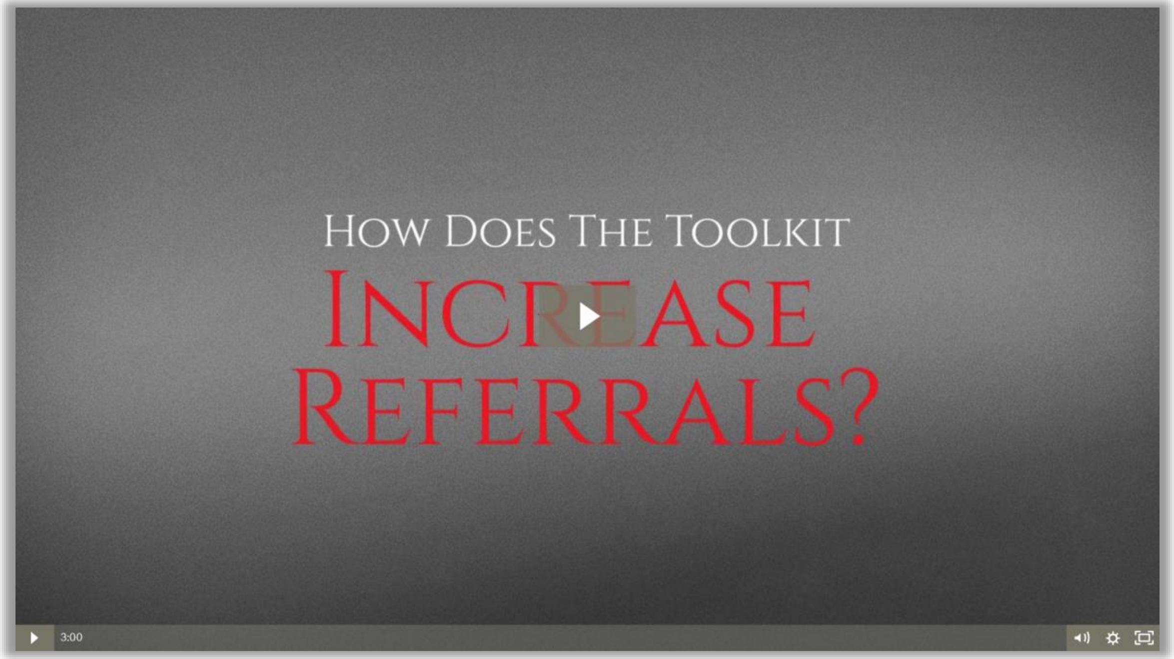
My SME does not feel unsolicited client referrals are “controllable.”

She thinks when they occur, they’re nice, but you can’t rely on them to grow the business

- ✓ Solicited Client Referrals
- ✓ Unsolicited Client Referrals

The Advisor P.A.C.T. Monthly Program™ Outcome

It's the same as the outcome implementing The Trusted Advisor Toolkit™
(our flagship advanced program)



Review The Monthly Session™ Archive

- ✓ When a client asks a specific planning question, should I allow my Subject Matter Experts to meet directly?
- ✓ Should I share all Ideal Client info with every SME?
- ✓ How do I get a clients' financial professional to release info?
- ✓ Should I record all meetings?
- ✓ Who should I show my Ideal Client Profile to?
- ✓ Financial Advisor Website Do's & Don'ts
- ✓ Client doesn't want to use ALL my SMEs (want's a discount)
- ✓ Team is asking me, "Why did you select the Advisor PACT™ business model?" What do you recommend I say?

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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.

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