ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT Monthly Session™

January 15, 2019

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**
- ✓ Turn off your **Phone**
- ✓ Multi-tasking **isn't** a thing (focus is the thing)

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

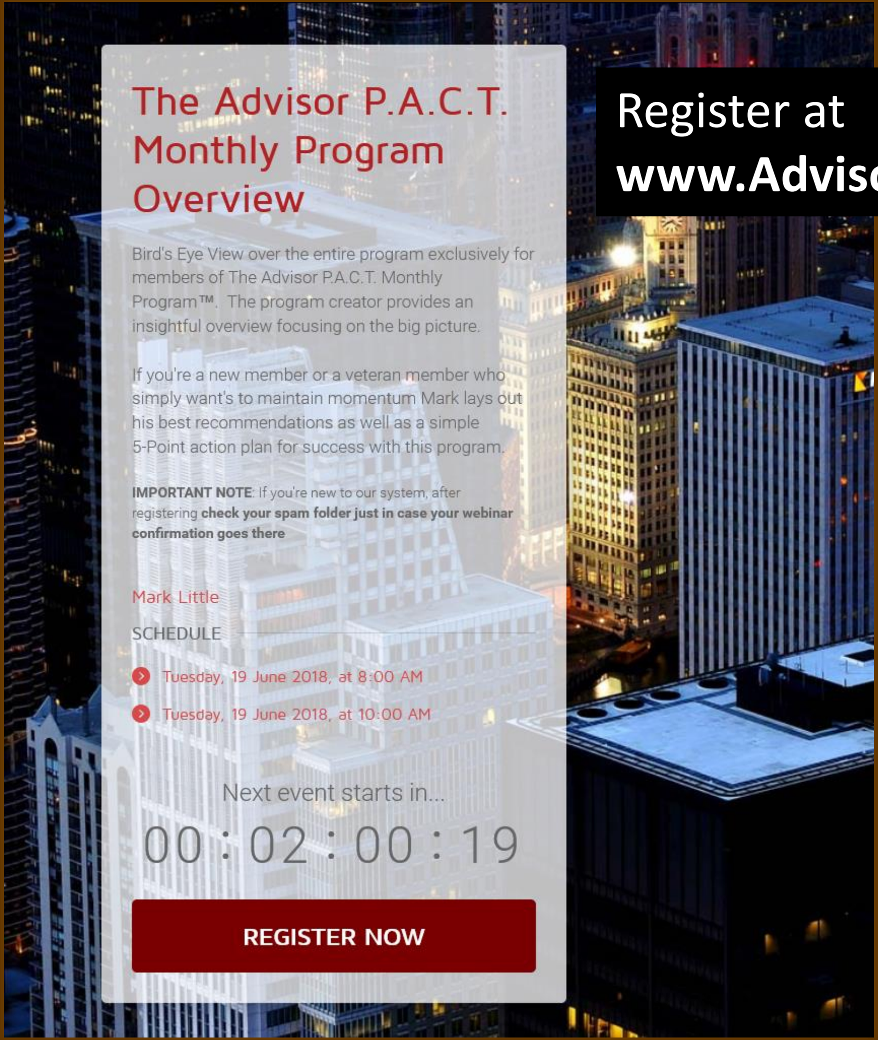
TRANSPARENCY

To every Ideal Client

Program Overview Webinar

to accelerate your results with
The Advisor P.A.C.T.
Monthly Program™

Register at
www.AdvisorPACTpledge.com



Register for the webinar at

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Welcome New Members to

The Trusted Advisor Toolkit

Fast Track

January 15, 2019

ADVISOR PACT

The 1st Fifteen Modules

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 | For Financial Advisors
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
When you provide The Ten Client Deliverables to your clients, you are providing Truly Comprehensive Financial Services.
Read more…

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.
Read more…

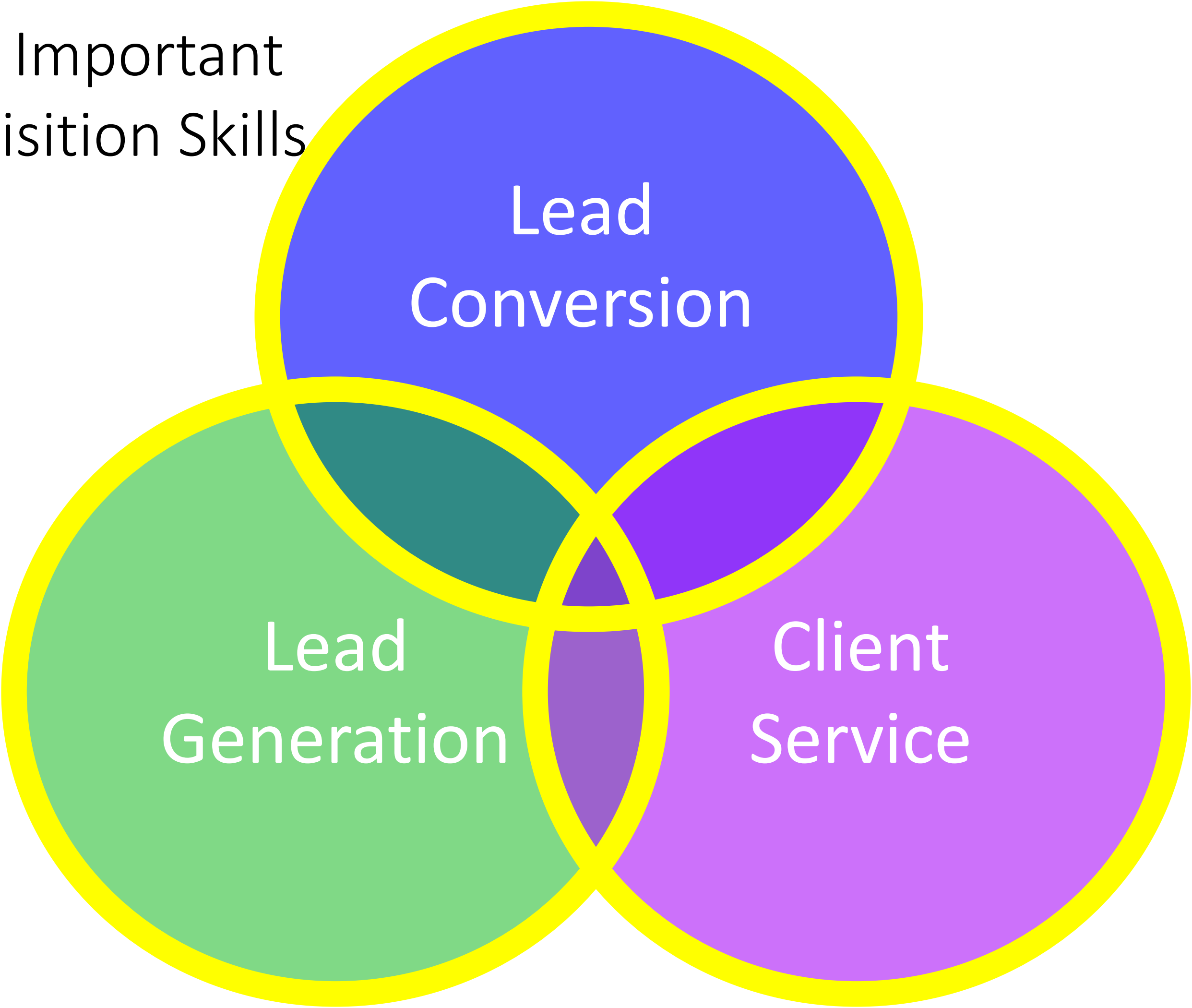
The Trusted Advisor Toolkit

Fast Track

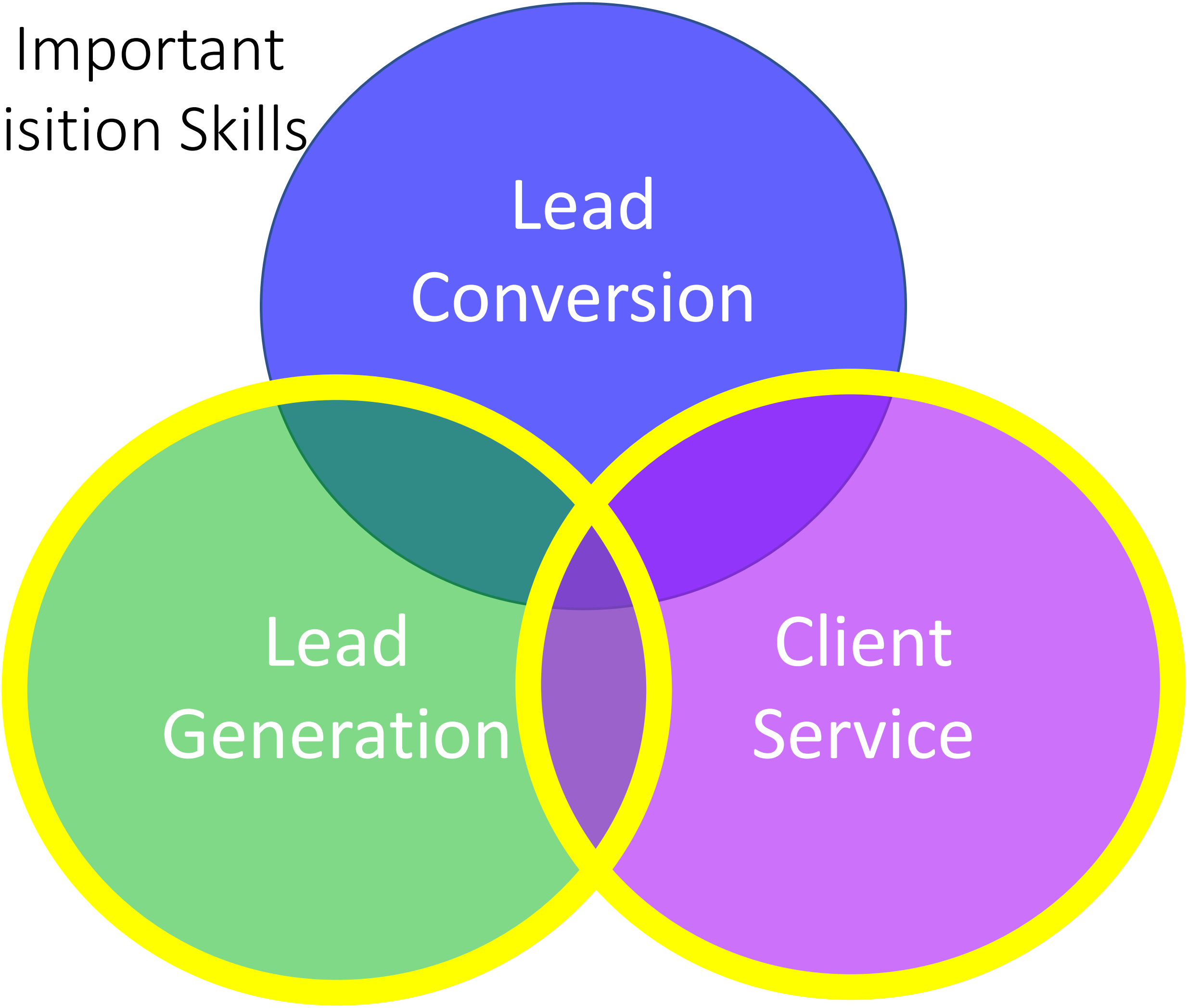
ADVISOR PACT

What is the Lead Generation process you’ve described in past Q&A sessions?

The 3 Most Important
Client Acquisition Skills



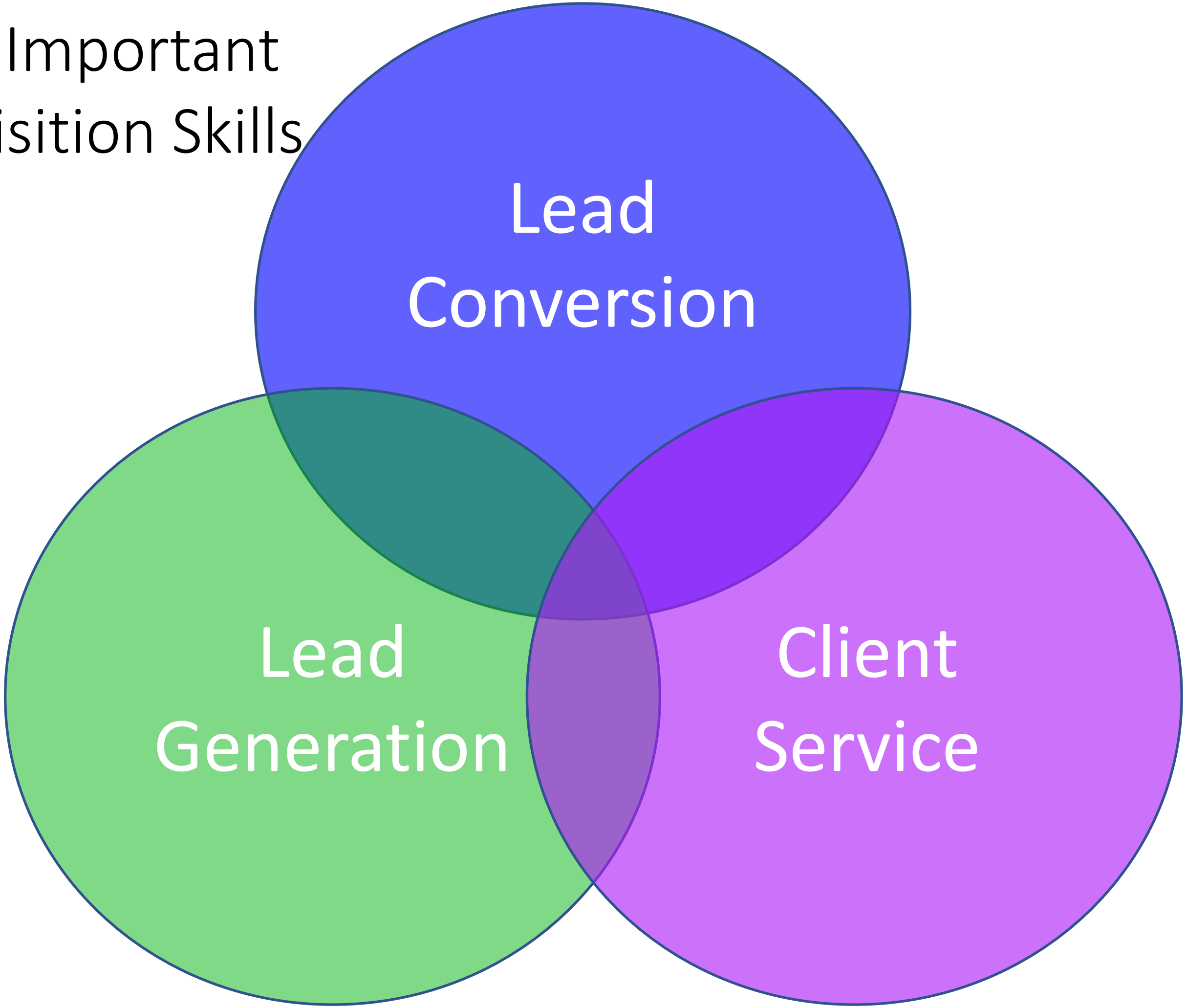
The 3 Most Important Client Acquisition Skills



The External Referability Project

The Internal Referability Project

The 3 Most Important Client Acquisition Skills



The Lead Generation Process

- ✓ Schedule ample time to get out of the office and meet new people
- ✓ No sales process, no sales scripts or tactics, not trying to "prospect"
- ✓ No cold calling, no approaching people who you haven't already been introduced to
- ✓ Just developing relationships
- ✓ In this (simple) method, you're introduced to new people by the people you already know

The Lead Generation Process

Needs to resolve 2 dilemmas…

- ✓ Don't know ***where to find*** or interact with lots of people who meet the Ideal Client Profile.
- ✓ Don't know exactly what to ***say*** when I do find myself face-to-face or on-the-phone with a Potential Ideal Client.

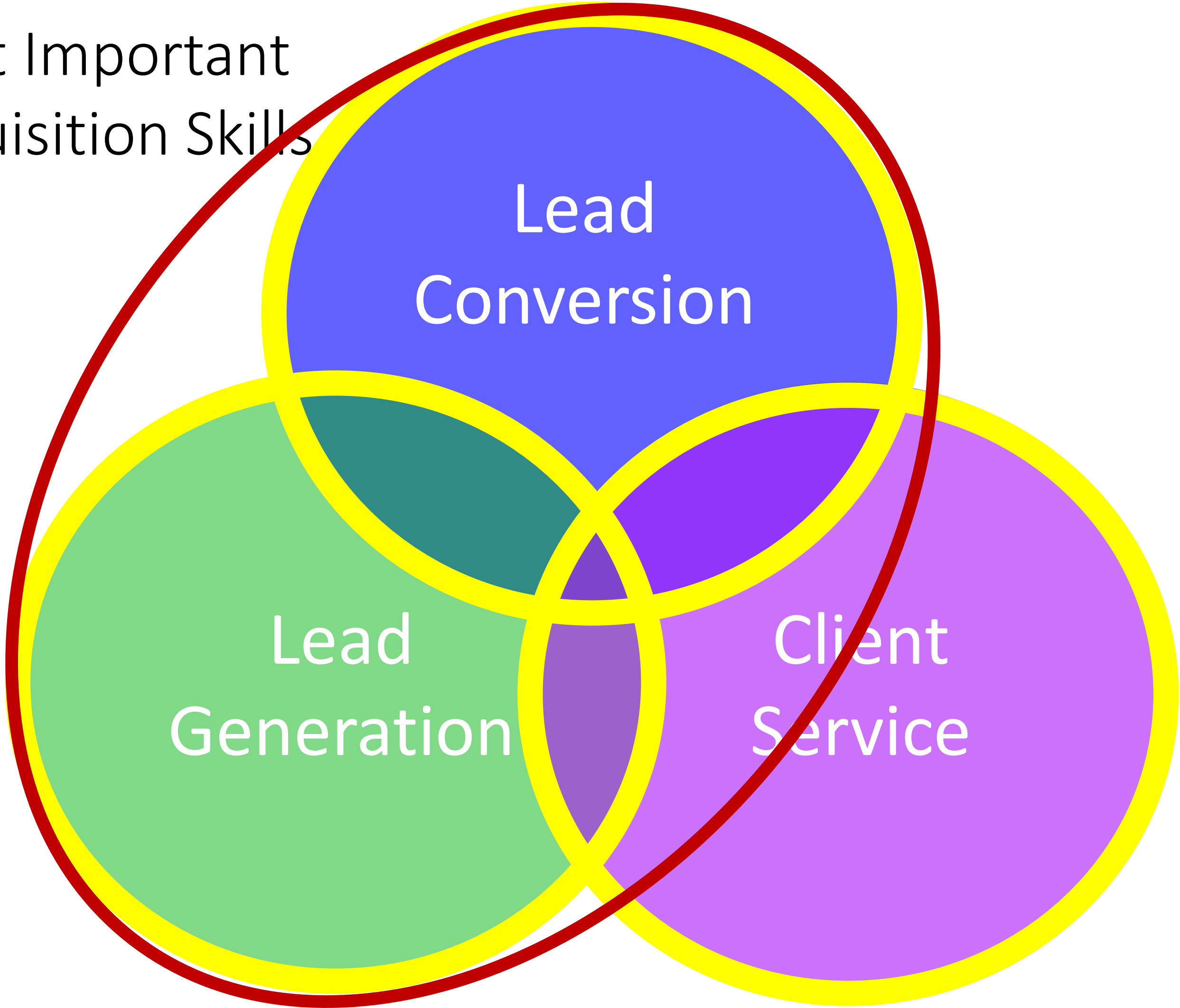
The Lead Generation Process

In my method we resolve these 2 issues…

- ✓ Don't know ***where to find*** or interact with lots of people who meet the Ideal Client Profile:
  The Marketing 101 Make a List Project (M101)

- ✓ Don't know exactly what to ***say*** when I do find myself face-to-face or on-the-phone with a Potential Ideal Client:
  The Fishing in The Right Ponds Project (FIRP)

The 3 Most Important Client Acquisition Skills



Many months ago you described
The Interaction Log™ process.

This has resolved lots of previous problems for us.

But now I have a new SME who’s struggling with it.
We’re having problems getting this Deliverables Team
Member to submit The Interaction Log™ promptly.

How have you handled this in the past?

The Interaction Log™ Template

- ✓ MONTH, DAY, YEAR, TIME & VENUE OF INTERACTION (Phone, E-mail, etc):
- ✓ INDIVIDUALS INTERACTING:
- ✓ PURPOSE FOR INTERACTION:
- ✓ BEST OUTCOME (hoped for in advance):
- ✓ LAST STEP WAS:
- ✓ HIGHLIGHTS OF INTERACTION:
- ✓ ACTUAL OUTCOME (OUTCOME ACCOMPLISHED?):
- ✓ NEXT STEP:
- ✓ INDIVIDUALS THIS INTERACTION AFFECTS (OR MAY AFFECT):

The Interaction Log™ Template

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The Interaction Log™ Template

What’s an interaction?

- ✓A face-to-face meeting or interaction.
- ✓A phone interaction.
- ✓An email
- ✓Any interaction whatsoever

The Interaction Log™ Template

What triggers The Interaction Log™?

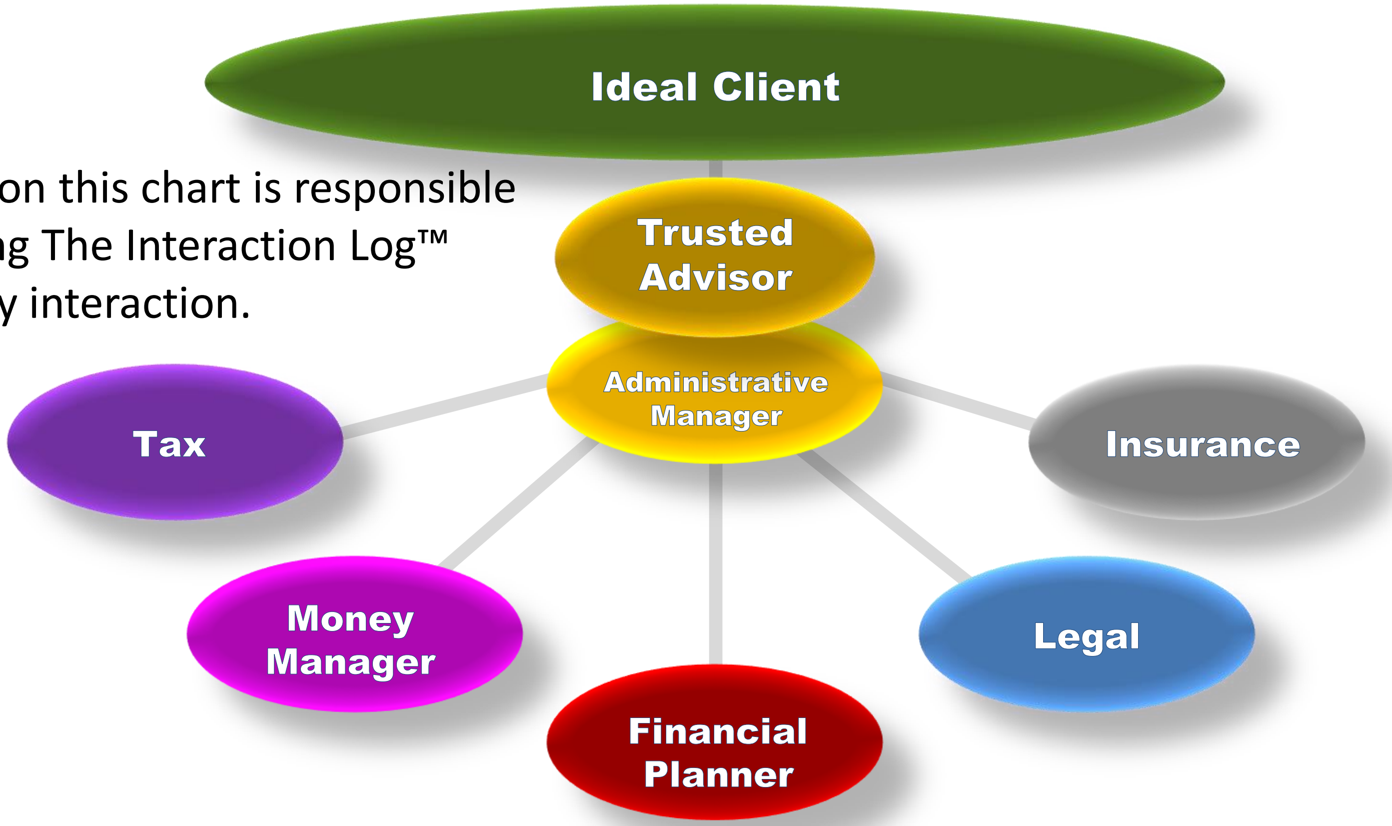
- ✓ A DTM speaks with another DTM
- ✓ A DTM speaks with an outsider about an Ideal Client situation
- ✓ A DTM contacts one of an Ideal Clients' institutions or other advisors
- ✓ A DTM interacts directly with an Ideal Client

The Interaction Log™ Template

The Standard: The Interaction Log™ is to be submitted to the Administrative Manager no later than 24-hours after any interaction

Our Deliverables Team Structure

Everyone on this chart is responsible for creating The Interaction Log™ after every interaction.



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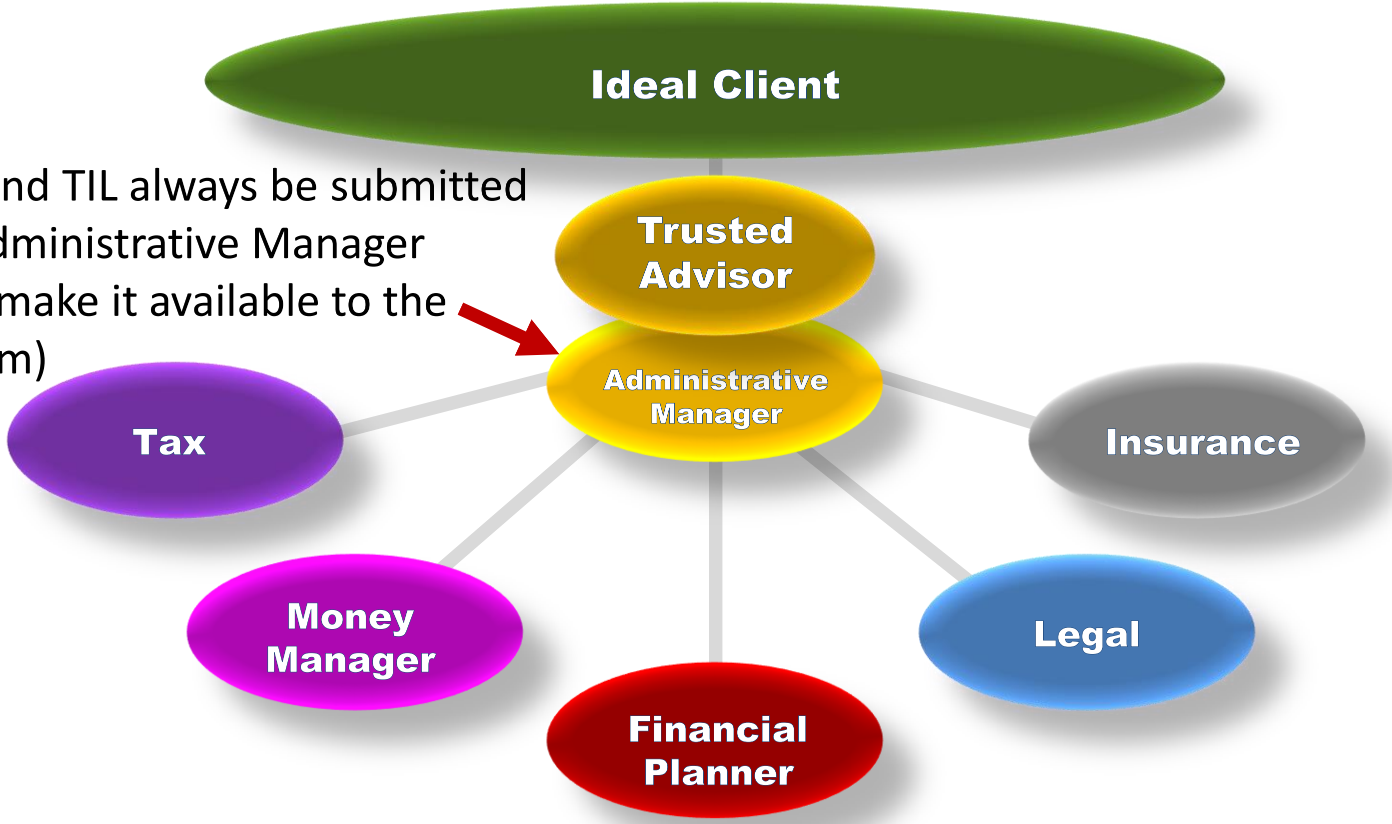
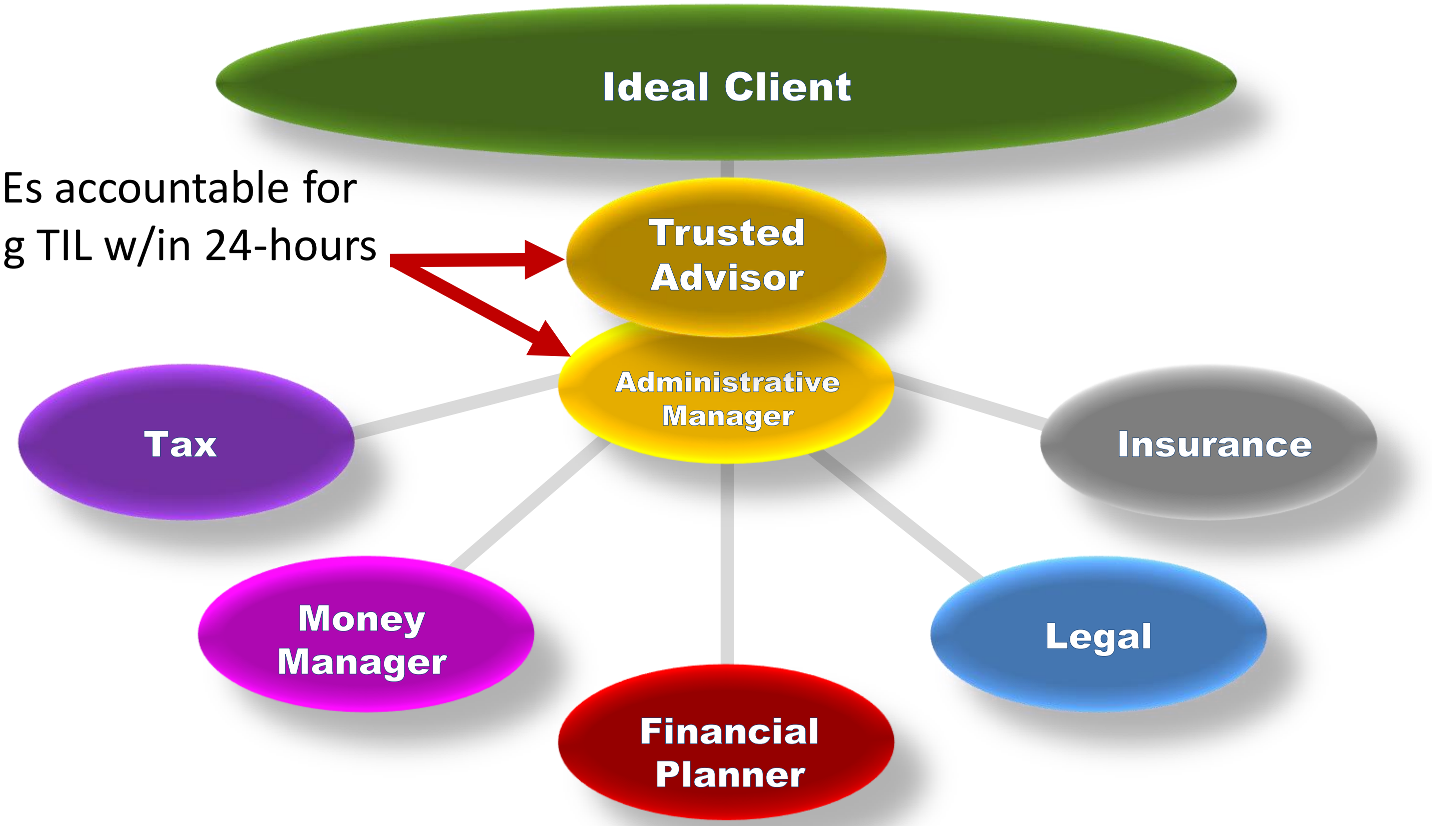
Our Deliverables Team Structure

Recommend TIL always be submitted to your Administrative Manager (who will make it available to the entire team)



Our Deliverables Team Structure

Holds SMEs accountable for submitting TIL w/in 24-hours



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The Interaction Log™

Enforcing The Interaction Log™ Standard

- ✓ ***1st failure to submit***: AM holds SME accountable. A one-on-one discussion.
- ✓ ***2nd failure to submit***: Discussion with TA holding SME accountable.
  - ✓ A one-on-one conversation with
  - ✓ TIL is a requirement of serving on this team.
  - ✓ A good team player understands the need of the others on the team to be well informed
  - ✓ 3 strikes you're out

The Interaction Log™

No team member will make the effort to do anything extra unless they’re convinced the “big boss” considers it to be a big deal.


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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.