



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

September 17, 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

To have the best experience today...

- ✓ Turn everything **else** off.
- ✓ For the next hour, don't check **emails**
- ✓ Close all **browsers**
- ✓ Turn off your **Phone**
- ✓ Multi-tasking **isn't** a thing (focus is the thing)

Have You Considered...

Something discussed today might just be a **game-changer for your business?**

You might miss it... **if you're not focused.**

Do you need
personalized coaching?



Do you have **unique obstacles**
that are in your way?

We're rolling out a



NEW service for you to get
you the coaching you need

Grab a pen & write this down...

Jot this down...



advisorpact.me/question



Send a voice message to Mark McKenna Little

What's your issue today?
If you could ask just 1 question, what would it
be? Your Biggest Struggle?

Is your microphone ready?



Start recording

1 Record - 2 Listen - 3 Send

Mark McKenna Little

Mark McKenna Little | Founder/Creator | The Mark of Mastery™ For Financial Advisors

www.TheMarkOfMastery.com

<https://themarkofmastery.com/>

advisorpact.me/question

You in a hurry to implement?



The quality & pace of your **implementation**
is directly tied to...

The quality & pace of your
questions **submitted**

advisorpact.me/question



That's because...

The quality & pace of your

questions submitted

is directly tied to...

The amount of **direct coaching** you receive

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... And the more **direct coaching**
you receive from our team...



The **faster** you will implement.

So ask **lots** of questions

advisorpact.me/question

You are here: [Home](#) / [Advisor PACT™ Monthly](#)

Advisor PACT™ Monthly

"Contact Us" link
is found on
every page in
our system



Increasing your
success in
The Advisor P.A.C.T.
Monthly Program™



The Mark of Mastery™

FOR FINANCIAL ADVISORS

Heaven Forbid You're Special



The System



Indispensable

Game Theory



Allows for winning



Allows for winning

...Harness Scarcity

An aerial photograph of San Diego, California, showing the coastline, beach, and city. The ocean is on the left, with waves breaking onto a sandy beach. To the right of the beach is a dense urban area with many buildings, streets, and parking lots. A large, colorful roller coaster is visible in the foreground. The sky is overcast with grey clouds. A semi-transparent black rectangle is overlaid on the image, containing the text "San Diego" in white.

San Diego



Scarcity



What's Your Game?

How do I measure success?



What am I supposed to measure to make sure my clients are satisfied?

How will I know that I'm consistently exceeding my Ideal Clients' expectations?



CUSTOMERS

The One Number You Need to Grow

by [Frederick F. Reichheld](#)

FROM THE DECEMBER 2003 ISSUE

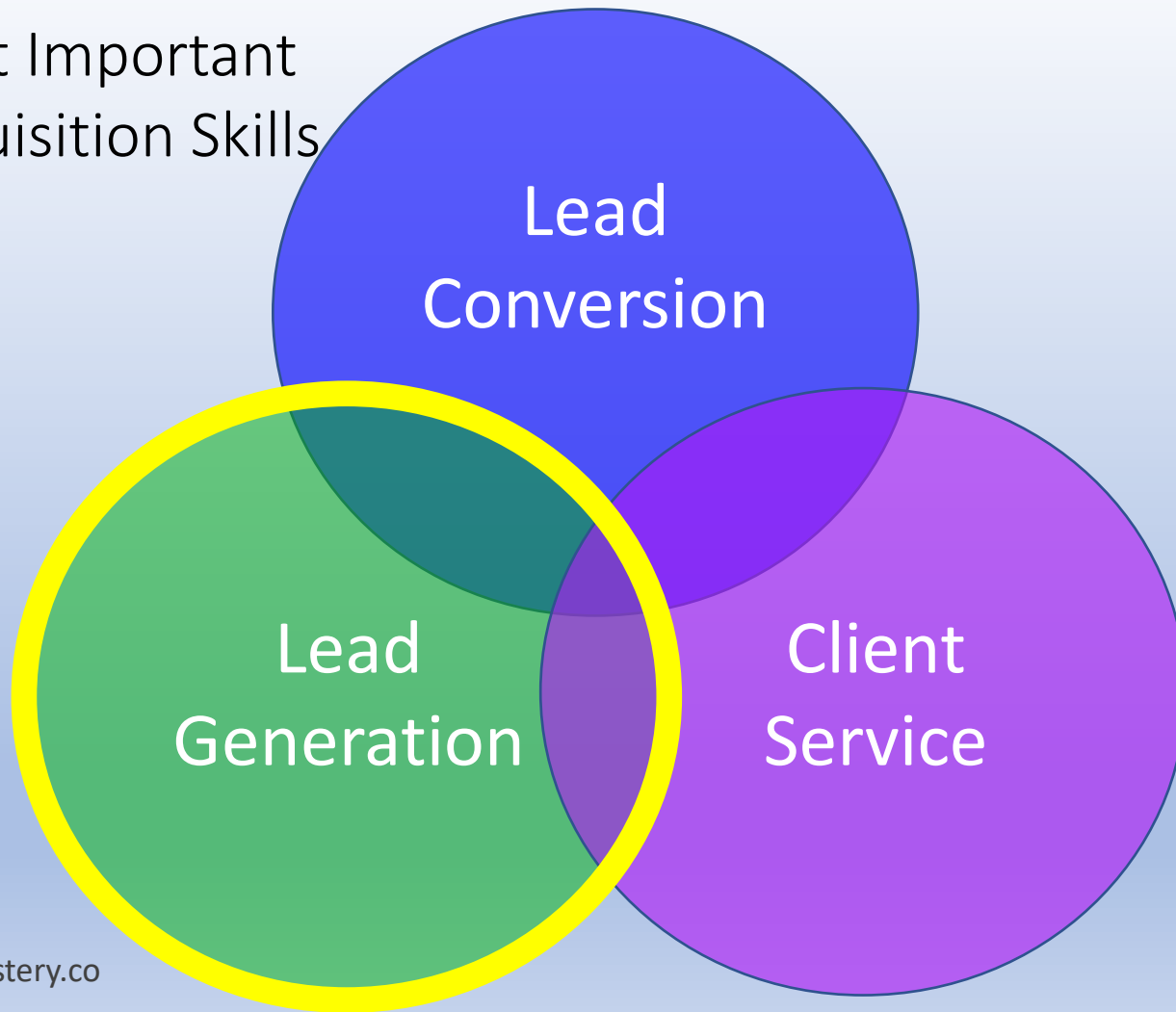
Summary Save Share Comment Text Size Print **\$8.95** Buy Copies

The CEOs in the room knew all about the power of loyalty. They had already transformed their companies into industry leaders, largely by building intensely loyal relationships with customers and employees. Now the chief executives—from Vanguard, Chick-fil-A, State Farm, and a half-dozen other leading companies—had gathered at a daylong forum to swap insights that would help them further enhance their loyalty efforts. And what they were hearing from Andy Taylor, the CEO of Enterprise Rent-A-Car, was riveting.

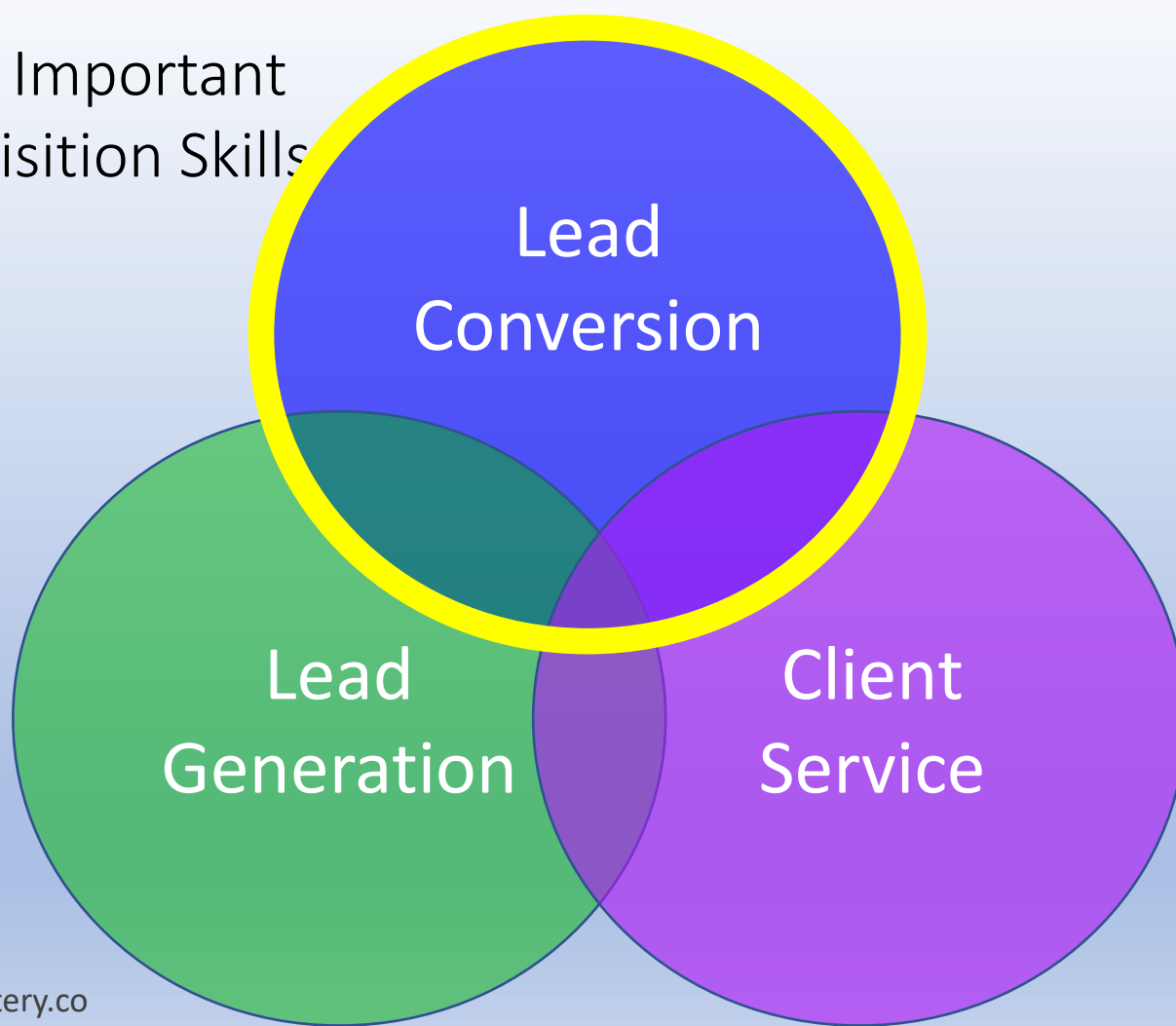
Taylor and his senior team had figured out a way to measure and manage customer loyalty without the complexity of traditional customer surveys. Every month, Enterprise polled its customers using just two simple questions, one about the quality of their rental experience and the other about the likelihood that they would rent from the company again. Because the process was so simple, it was fast. That allowed the company to publish ranked results for its 5,000 U.S. branches within days, giving the offices real-time feedback on how they were doing and the opportunity to learn from successful peers.

The survey was different in another important way. In ranking the branches, the company counted only the customers who gave the experience the highest possible rating. That narrow focus on enthusiastic customers surprised the CEOs in the room. Hands shot up. What about the rest of Enterprise's customers, the marginally satisfied who continued to rent from Enterprise and were necessary to its business? Wouldn't it be better to track, in a more sophisticated way, mean or median statistics? No, Taylor said. By concentrating solely on those most enthusiastic about their rental experience, the company could focus on a key driver of profitable growth: customers who not only return to rent again but also recommend

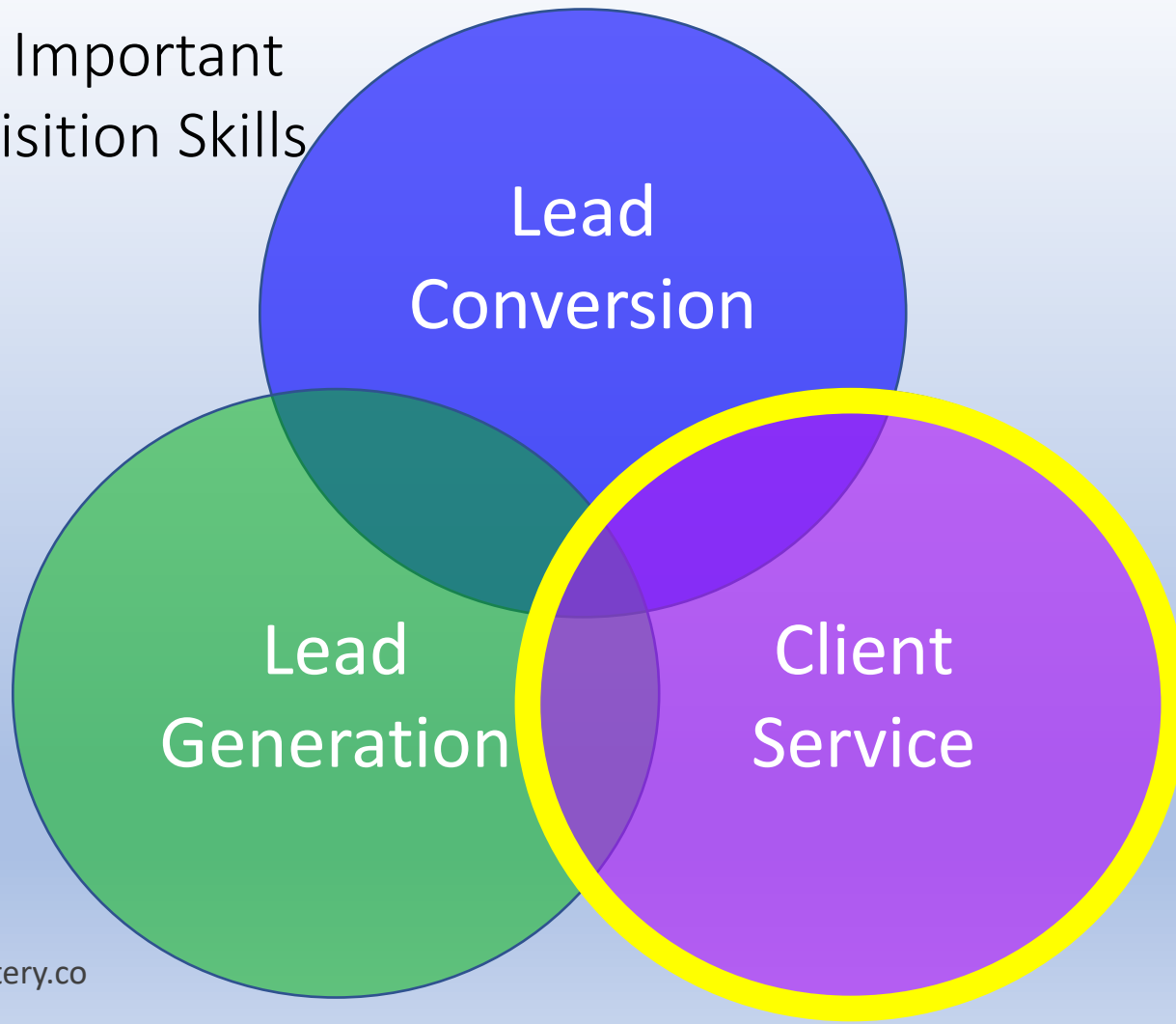
The 3 Most Important Client Acquisition Skills



The 3 Most Important Client Acquisition Skills



The 3 Most Important Client Acquisition Skills



Spontaneous Unsolicited Client Referrals

The Essential Concepts Of Advisor PACT

Vision and Goals | For Financial Advisors

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

The Extraordinary Client Experience

The Annual Referral Rate and Referability Dashboard

ReferabilityDashboard.png

Manage portals

You are here: Home / The Monthly Project™ / The Annual Referral Rate and Referability Dashboard

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Actions Display Add new State: Private

The Annual Referral Rate and Referability Dashboard

By exceeding client expectations, you can increase the quantity and quality of referrals you receive.



Watch: The Annual Referral Rate and Referability Dashboard™ (49 minutes)

Objective	Understand why The Annual Referral Rate is the single most important metric to understand whether or not you are exceeding your clients' expectations. Begin tracking your Annual Referral Rate using The Referability Dashboard.
Instructions	<ol style="list-style-type: none"> 1. Block time on your calendar and watch the video above. 2. Download The Referability Dashboard™ with sample data

2 types of SME Candidates



I'm interviewing lots of Subject Matter Expert Candidates. Most are skilled technically, but aren't impressive... at least to me.

So, what's more important? An SME who's technically competent or one who's able to impress clients who meet my Ideal Client Profile?

Requirements

- ✓ Has more Ideal Clients than you
- ✓ Has at least two Admin Support staff

With those 2 firmly in place...

... my preference: **Impressive**

How to report "On Track?"

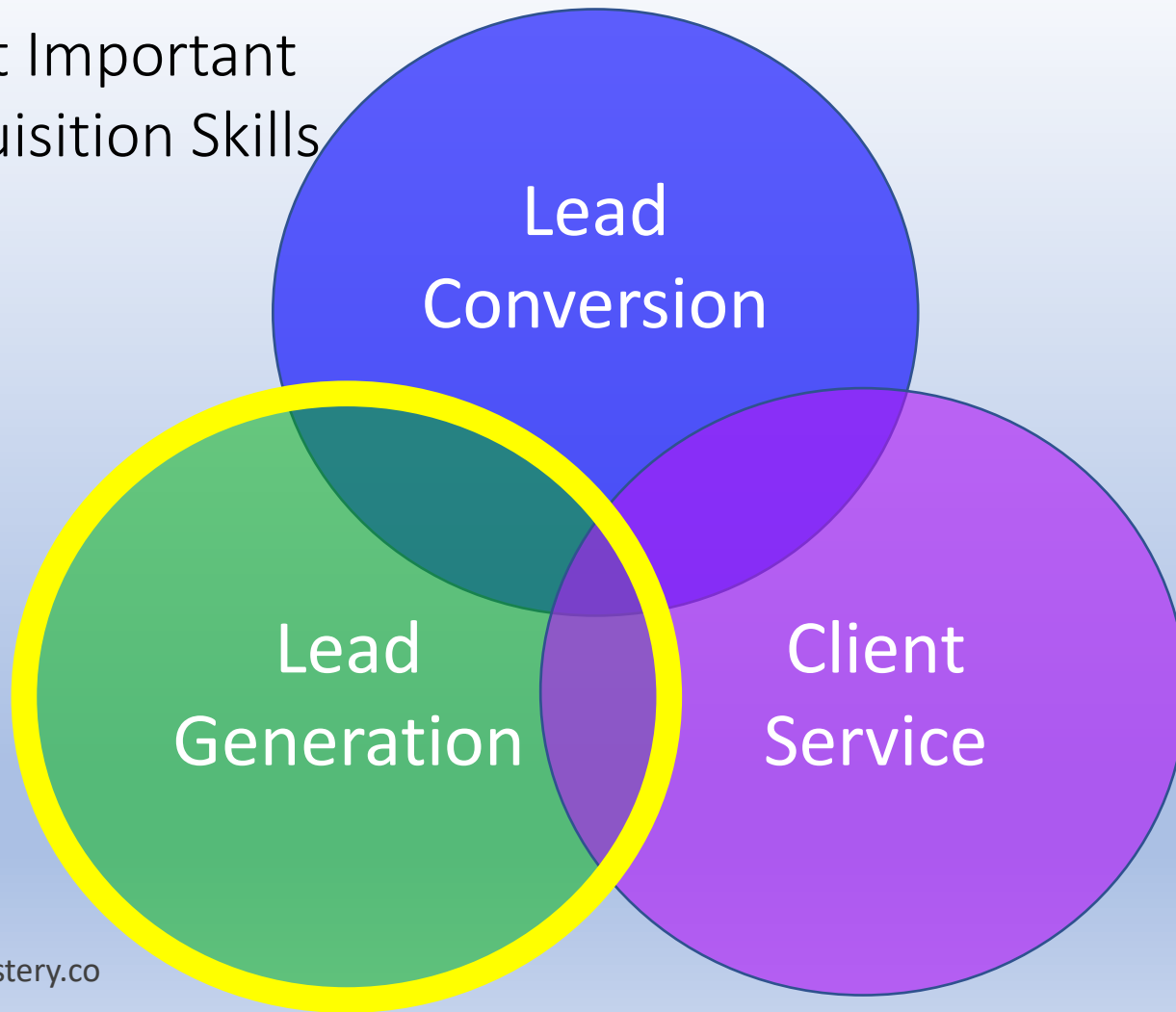


My biggest obstacle is meeting ideal prospects who can become ideal clients. I love talking to people and I am confident I will get better and better at this. Just meeting good prospects and getting them in the door is that challenge.

There is a private club in my town that is full of ideal prospects but there is no way I can afford to join it. I just want to get in front of qualified prospects. Most of my current clients are sticky gum but for now they pay the bills.

Our industry does not teach prospecting correctly nor does our license process turn out good financial planners. I feel like everyone should pass the CFP test and be an apprentice for three years before being able to practice. of course funding would be challenge.

The 3 Most Important Client Acquisition Skills





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advisorpact.me/question

The Advisor P.A.C.T. Monthly Program Overview

Bird's Eye View over the entire program exclusively for members of The Advisor P.A.C.T. Monthly Program™. The program creator provides an insightful overview focusing on the big picture.

If you're a new member or a veteran member who simply wants to maintain momentum Mark lays out his best recommendations as well as a simple 5-Point action plan for success with this program.

IMPORTANT NOTE: If you're new to our system, after registering **check your spam folder just in case your webinar confirmation goes there**

Mark Little

SCHEDULE

➤ Tuesday, 19 June 2018, at 8:00 AM

➤ Tuesday, 19 June 2018, at 10:00 AM

Next event starts in...

00 : 02 : 00 : 19

REGISTER NOW

Register at
www.AdvisorPACTpledge.com

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 a Project Leader for your business.

[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

September 17, 2019

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ADVISOR PACT



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.