



PROTECTION ATTENTION COORDINATION TRANSPARENCY

# **The Advisor PACT** **Monthly Session<sup>TM</sup>**

October 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

***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.****

What do you know  
about  
**unsolicited** client referrals?



What **questions** do you have about  
unsolicited client referrals?



Use my **NEW**  
service 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](http://www.TheMarkOfMastery.com)

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## Advisor PACT™ Monthly

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

My B/D won't allow me to have   
Outside Business Activity (OBA).

Any advice?

[advisorpact.me/question](https://advisorpact.me/question)





**О В А**

# How do I know my Ideal Clients' expectations?



I know that the objective is to exceed every Ideal Clients' expectations.

But I'm not sure where to begin. How can I be sure I understand all my clients' expectations?

Honestly, I think I've just been assuming what they expect... by backing-into the services we offer.

# How do I know my Ideal Clients' expectations?

1. **Record** every meeting & **listen** to every recording.

- ✓ Clients and potential clients provide all kinds of **clues** about what they expect during routine meetings. Read **between** the lines.
- ✓ They could be **complaining** about something in the past, or **hoping** for something in the future. Either way, listen for clues.
- ✓ Listen to the last recording **just prior to** each meeting. It's a **skill**.

# How do I know my Ideal Clients' expectations?

## 2. **Ask** them.

- ✓ Schedule a special meeting to discuss their expectations.
- ✓ What has been the financial accomplishment you're **most proud of**?  
What's been the **worst financial situation** you've ever faced?  
If you had to do it all over again what would you do **differently**?  
(what role **could you have played** to improve the situations?)
- ✓ Review your Advisor PACT™ Pledge, **questioning their expectations.**

# How do I make my meetings more compelling?



My 3 SMEs (FP, Tax & Est) keep telling me my 3 Ideal Clients are on-track but that if I want to make the meetings more compelling, that will be up to me to figure out.

Their position is that they've been hired for their technical skill and as long as the client is on-track, with no problems on the immediate horizon, then that's all I should require from them.

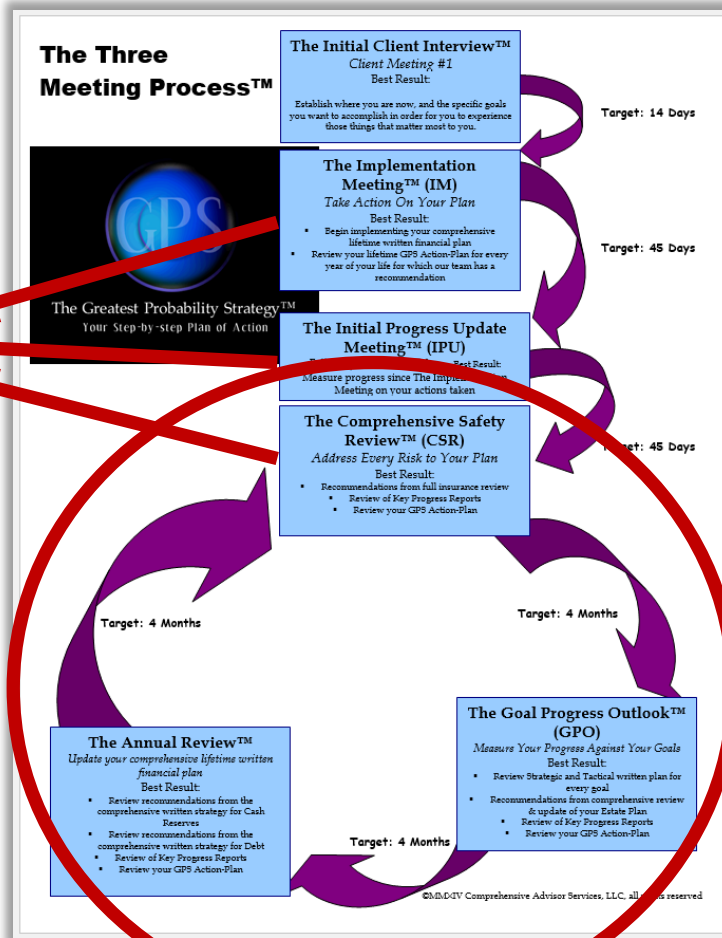
(I think my tax sme has convinced the other two of this).

# You've outlined 3 issues that each need addressing...

1. Your meetings are not as **compelling** as they need to be
2. Your SMEs say they have **no responsibility** for  
"Exceeding Ideal Clients' Expectations"
3. One individual SME is **causing controversy and disharmony** among team members.

## The One-Time Meetings (104 Days)

- ✓ Gather all client information & docs
- ✓ Create this client's comprehensive written lifetime financial strategy (overarching plan)



## The Routine Meetings (every 4 months)

- ✓ Update client information & docs
- ✓ Report "On Track" in each area.
- ✓ The 3 bottom-line client outcomes
- ✓ Keep your IC's "financial house" in order for the rest of their life.

# SMEs are **responsible** for exceeding Ideal Clients' expectations...

1. The SUSO Meeting:  
The Shape Up or **Ship Out** Meeting
2. Bring at least 2 SMEs **into each meeting.**  
SMEs who are required to face clients are held to a higher standard.



# Client Meetings are not as **compelling** as they need to be...

1. What will be your **largest expenditure** before the next meeting?
2. Confirm each SME is clear about **the largest upcoming issue** within their narrow field of expertise.
3. Ask your SMEs to deliver **their own recommendations** in each meeting.

# One individual SME is causing **disharmony** ...

1. Leadership: Sit them down and **confront the issue**.  
Cease & desist immediately. SUSO conversation.
2. Quietly **begin interviewing** new SMEs for that role now.  
Launch The Deliverables Team Recruitment Process™
  - ✓ Your SME will have some time to become your most inspiring SME
  - ✓ If they're lucky they'll have up to 60-days before you find someone better
3. **Always** be interviewing for SMEs  
(the weakest link on the team)



**SUSO**

# The 3 issues you addressed...

1. Your meetings will be **compelling**
2. Your SMEs have **FULL responsibility** for "Exceeding Ideal Clients' Expectations"
3. Every SME must be **contributing** and **provide evidence** for how they they have exceeded Ideal Clients' expectations over the past 4 months.



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## 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](http://www.AdvisorPACTpledge.com)**



## **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.