



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Advisor PACT **Monthly SessionTM**

November 19, 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.****

Mark just to clarify, I understand you acquired 83 Ideal Clients in 34 months, and then closed your business to new clients.



So, you acquired 2½ Ideal Clients per month, and then continued to receive client referrals at that same rate even after you stopped accepting new clients. Have I got that right?

My question is, do you feel that sort of Client Acquisition is possible in today's market environment, with the world economy and the political environment being so questionable?



The Method I followed

- ✓ In College (late 1970s) we studied this M&A model...
 - Find an industry **in chaos** going through the agony of cataclysmic change
 - Bring **order** to that change
 - Emerge from the battlefield of chaos with a company that provides order & **leadership**
 - Make a **ton** of money



The Method I followed

- ✓ The Chaos I saw in The Financial Services Industry:
(in the 1980s)
 - Unimpressive **Service levels**,
 - Advisors charging large fees for **providing little of value**
(in clients' minds),
 - Very **low differentiation** between advisors
(in clients' minds Financial Advisors were all the same)
 - Client **loyalty** weak,
 - Technology making investing seem easier (**commodity**)



The Method I followed

✓ I brought order (I introduced what clients wanted)...

1. **Specific deliverables** (unusual clarity): The Ten Client Deliverables™
2. **Proactive** (Consistently Exceed Client Expectations): The Three Meeting Process™ (scheduled 12-months out at all times)
3. **The Four Client Expectations™** (Behave the way clients want, but can't find anywhere): Advisor PACT™
4. **The 3 Bottom-line Client Outcomes** (provide simple consistent value):
 1. Promise: ***Always on-track***
 2. Promise: ***Never miss opportunity/no financial surprises***
 3. Promise: ***Make better financial decisions in all areas***

Dow Jones Industrial Average



← Acquired 2½ Ideal Clients per month/ average →
...and continued receiving client referrals **at the same rate** after that!



The Method I followed

✓ The Chaos I see today in The Financial Services Industry (for 2020):

- Unimpressive **Service levels** (service levels are **worse today**)
- Advisors charging large fees for **providing little of value** (in clients' minds **advisor value is even less today**)
- Very **low differentiation** between advisors (in clients' minds **Financial Advisors are still all the same**)
- Client **loyalty** weak (**competition is tougher** & client loyalty is weaker)
- Technology making investing seem easier (**worse today**)

Your opportunity has never been better than today.

- ✓ The modules in this program take you through this same method I followed
- ✓ Client service levels are low today
 - ✓ Clients complain of "cookie cutter service" and...
 - ✓ Financial Advisor Meetings which are not worth attending
- ✓ Ideal Clients are more appreciative of high-end service today
- ✓ You have the potential to acquire clients more quickly than I did
- ✓ The opportunity to take the best clients away from veteran advisors has never been better than it is today.
 - ✓ Once potential clients understand the value you provide...
 - ✓ They'll fire their current advisor and hire you



How do I figure out
my Ideal Client's expectations
(so I may exceed them),
and how do I run a compelling
Client Progress Meeting?

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.



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.



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.



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.



The Role of the Administrative Manager

Your Administrative Manager is not an administrative support person—they are the Project Leader.



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.



The Deliverables Team Recruitment Process

Acquire your next Deliverables Team member in 12 simple steps.



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.



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.



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.



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.



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.



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.



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.



The Annual Referral Rate and Referability Dashboard

By exceeding client expectations, you can increase the quantity and quality of referrals you receive. Here's how to accurately measure your progress.

This is a big topic

Macro:

- ✓ Master the basics
- ✓ Invest substantial time eliminating things clients dislike

Micro

Articles

▶ 37 (Easily Fixable) Things That Annoy Affluent Clients

Mark's Story: How I Became
"The Only Game In Town"

Search this website ...

Find out more
about ReferabilityReady to take your client
experience to the next level? Learn
more about our Referability
program.[Discover Referability](#)



37 (Easily Fixable) Things That Annoy Affluent Clients



Want To Know What Might Be An Obstacle To Increasing Client Referrals?

Here are 37 common Financial Advisor practices that successful affluent clients hate... but might never tell you!

Many of these are practices and habits so common that you might never realize they are raising red flags for your clients. Most of the time, the clients won't even bother to complain.

▶ 0:00 / 1:12:56  

mp3

Full Audio

[DOWNLOAD](#)

PDF

Transcript

[DOWNLOAD](#)

www.TheMarkOfMastery.com/articles

This is a big topic

Macro:

- ✓ Master the basics
- ✓ Invest substantial time eliminating things clients dislike
- ✓ Map-out an extraordinary client experience
(make the mundane extraordinary)
- ✓ The Team Goal: Create a culture of consistently impressing clients

Micro

- ✓ Continually ask clients what would exceed their expectations
- ✓ Listen to meeting recordings (listen for clues from clients)
- ✓ Consistently create CUSTOM Deliverables Checkpoints™ as you discover structural deliverables which impress all, or some, of your clients

For More Coaching Do This...

- ✓ Conduct a serious one-on-one conversation with some of your top clients asking them what would exceed their expectations in their relationship with you.
 - ✓ Ask the questions we just reviewed
 - ✓ Create a memo to send me
 - ✓ Summarize their most interesting responses
 - ✓ Brainstorm a few Client Service Action Items with others on your team
 - ✓ Now, draft several actionable proposals for creating an even more extraordinary experience for clients and potential clients.
- ✓ Send this to me using the "Contact Us" link found on every page of this program

I'll provide you with coaching and will help you establish a plan for becoming The Only Game In Town



I attended the 3-day live event in
San Diego and it was my
understanding that you would send
the 100 item check list if requested
on client meetings.



Comparison

The Advisor P.A.C.T. Monthly Program™

- **DIY**: Step-by-step "how to" for creating Truly Comprehensive Financial Services™
- Program shows you **how to create** your own Deliverables Checkpoints™ underneath The Ten Client Deliverables™
- **Self paced**: For advisors who want to go at their own pace

The Trusted Advisor Toolkit™

- **DWY**: Software for Delivering Truly Comprehensive Financial Services™
- Program **provides** 142 Deliverables Checkpoints™ underneath The Ten Client Deliverables™
- **Fast paced**: For advisors who are acquiring more than 1 Ideal Client per quarter (6+ per year consistently)

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

Advisor PACT™ Monthly

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

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 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.