



The Mark of Mastery™

FOR FINANCIAL ADVISORS

Presented by
Mark McKenna Little



Mark's Before & After

1987

(In my 20's -BB)

- October 1987 (Black Monday)
- 7 months into my career
- Dow Jones Industrial Average falls 508 points (22.6%)
- The largest one-day drop (%) in its history
- MY LOW PRODUCTION (Last Place at \$12/year)
- Weekly meeting **to keep my job**

2002

(15 years later –AB)

- 100 Ideal Clients
- Making a difference!
- \$1.6MM in annual recurring revenue
- Client Service 100% delegated to my team (not me)
- Working 3 days/week (M, W, F)
- **#1 at the firm** (for 12+ years)



What was the **first
breakthrough in my career?**



**One Year to figure this out
(1987)**



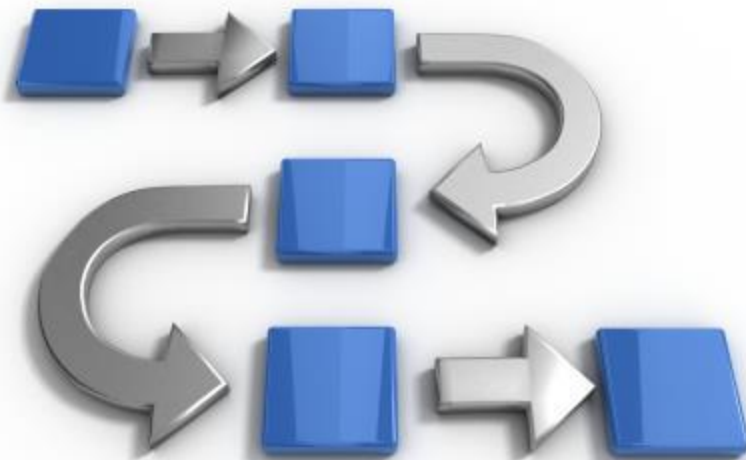
..And **One Year to implement it
(1988)**



Refer
a
Friend









How **important is Client Acquisition to you?**

**On a scale from 1 – 10
(10 being “**new revenue is CRITICAL!!!!**”)**



**Everyone
is a FREE
referral
source**

Career Breakthrough #1

**Refer
a
Friend**





**I need to be
investing
more than
50% of my time
with Client
Acquisition**

Career Breakthrough #1

**Refer
a
Friend**





- ✓ **1987 Figuring this out**
- ✓ **1988 FULLY Implementing**

**..by 1989 I was #1 at my
nationwide B/D**

...FOREVER



**How does an introvert with call
reluctance acquire 1,242
clients?**



**So, if Referrals From Friends
was my #1 business
breakthrough
...can you guess what my next
business breakthrough was?**



Referrals From Clients



**So, what would you have to do
differently to consistently
receive **2-3 referrals** after
EVERY client progress
meeting?**



If you want **more
client referrals
You need to be
more referable**





So then...

**How does an introvert with call
reluctance acquire 1,242
clients?**



**EXCEED
EXPECTATIONS**

GET IT DONE

NOT QUITE

GOOD TRY





1999



Newport, RI
Friday June 11th 1999
11:10 A.M. Eastern



N

SOLUTION

SOLUTION



**I politely
disengaged from
1,225 Non-ideal
Clients**

A close-up, slightly angled photograph of a computer keyboard. The central focus is a large, rectangular key with a vibrant green surface. On this green key, the word "engage" is printed in a bold, white, sans-serif font, slanted slightly upwards to the right. To the left of the text, there is a small white icon of a left-pointing arrow. The surrounding keys are dark grey or black with white symbols: a semicolon and apostrophe to the top left, a greater-than sign and period to the bottom left, a question mark and forward slash to the bottom center, and a double-left-quote symbol to the bottom right. The lighting creates soft shadows, emphasizing the three-dimensional nature of the keys.

engage



- ✓ Breakthrough 1: All friends refer
- ✓ Breakthrough 2: Client referrals



...can you guess what my **final business breakthrough was?**

Breakthrough 3:

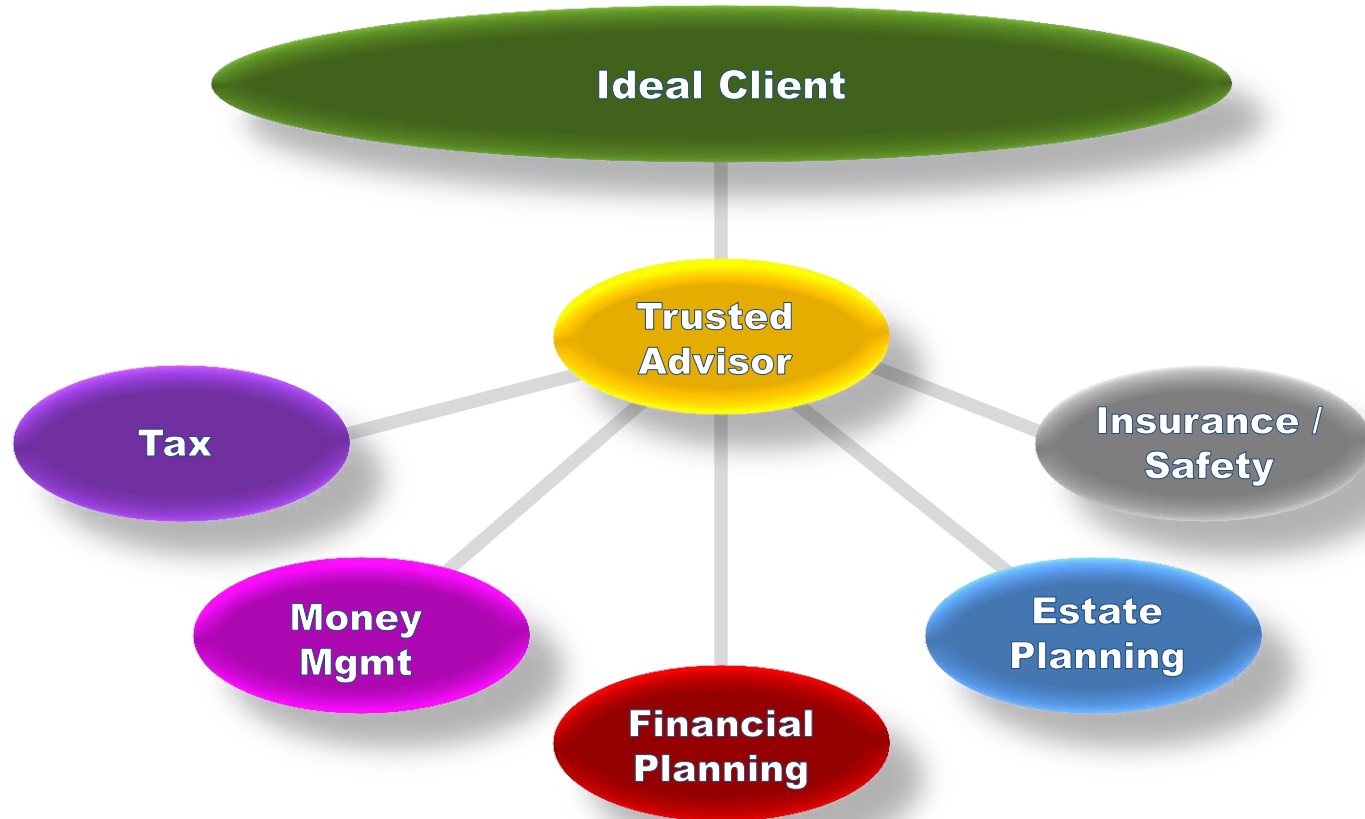
Build An **Extraordinary Team**



Truly Comprehensive Financial Services™



How to Consistently EXCEED Expectations









Make an **Advisor PACT™** **Pledge to every** **Ideal Client**

ADVISOR | **PACT**TM

A New Financial Advisor Paradigm

Protection
Attention
Coordination
Transparency

1

Protection

POLICE

2

Attention





3

Coordination

4

Transparency





No clients
shopping.
You're the Only
Game in Town



**So what
happened
after I met Bill?**



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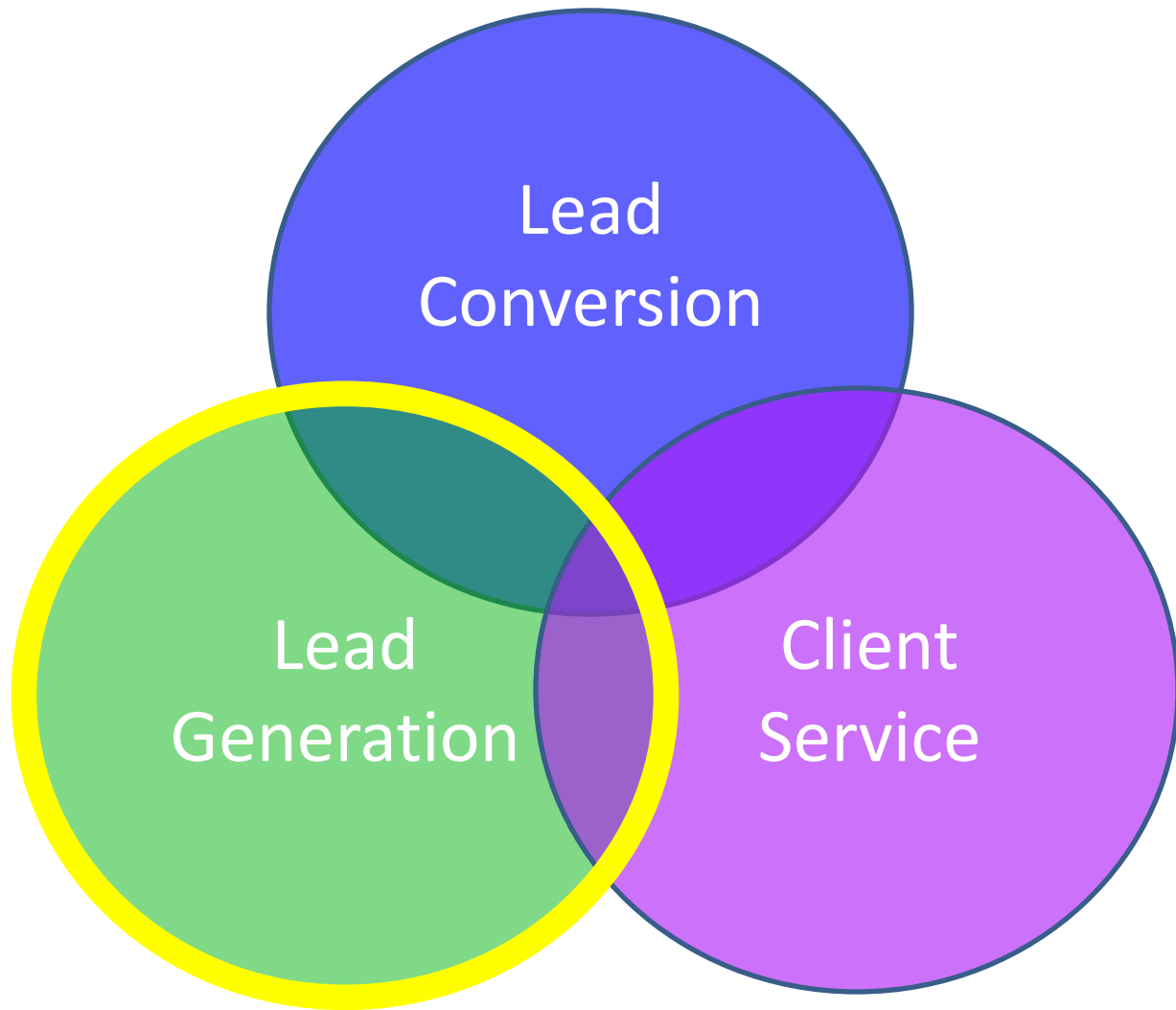
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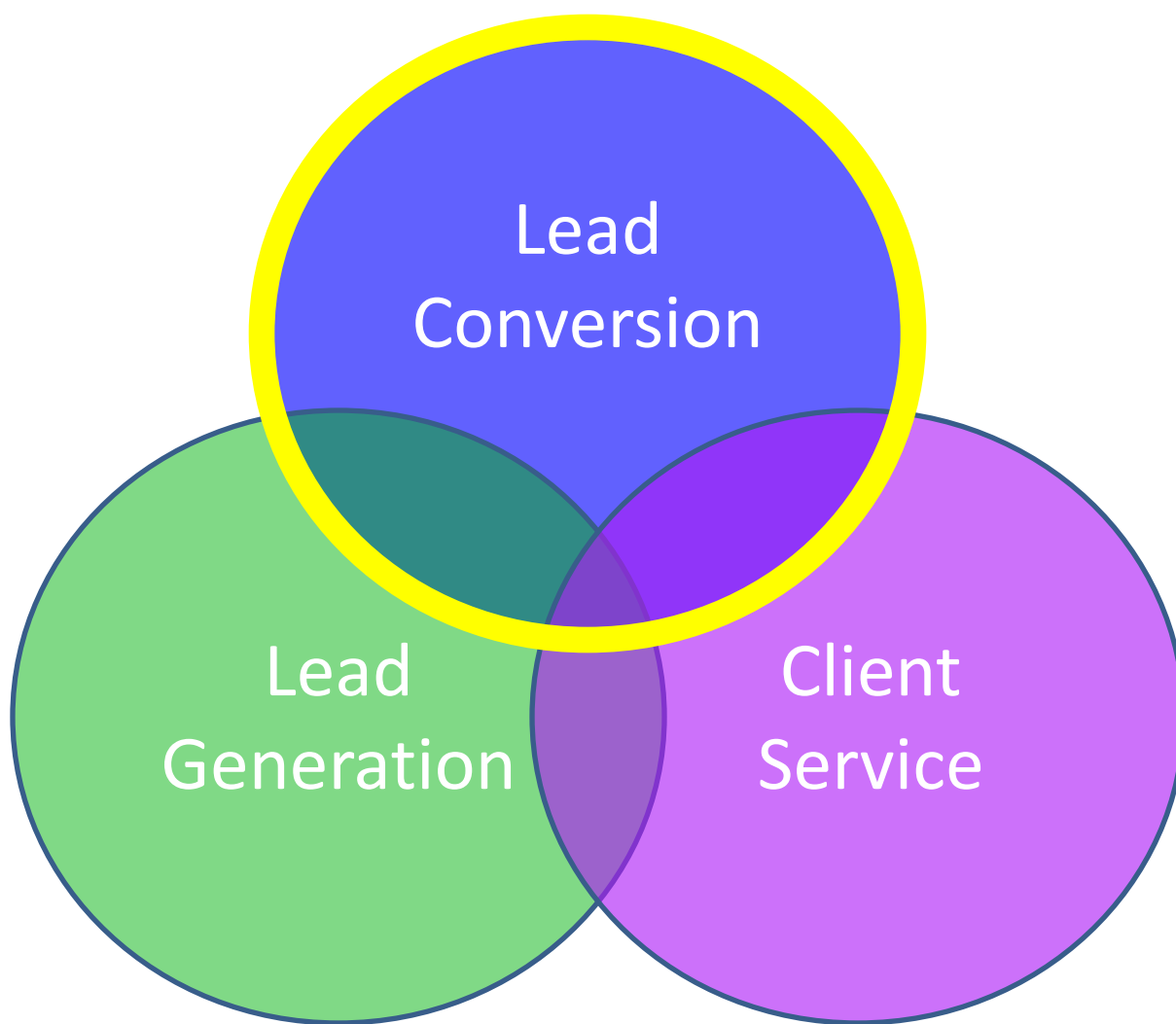
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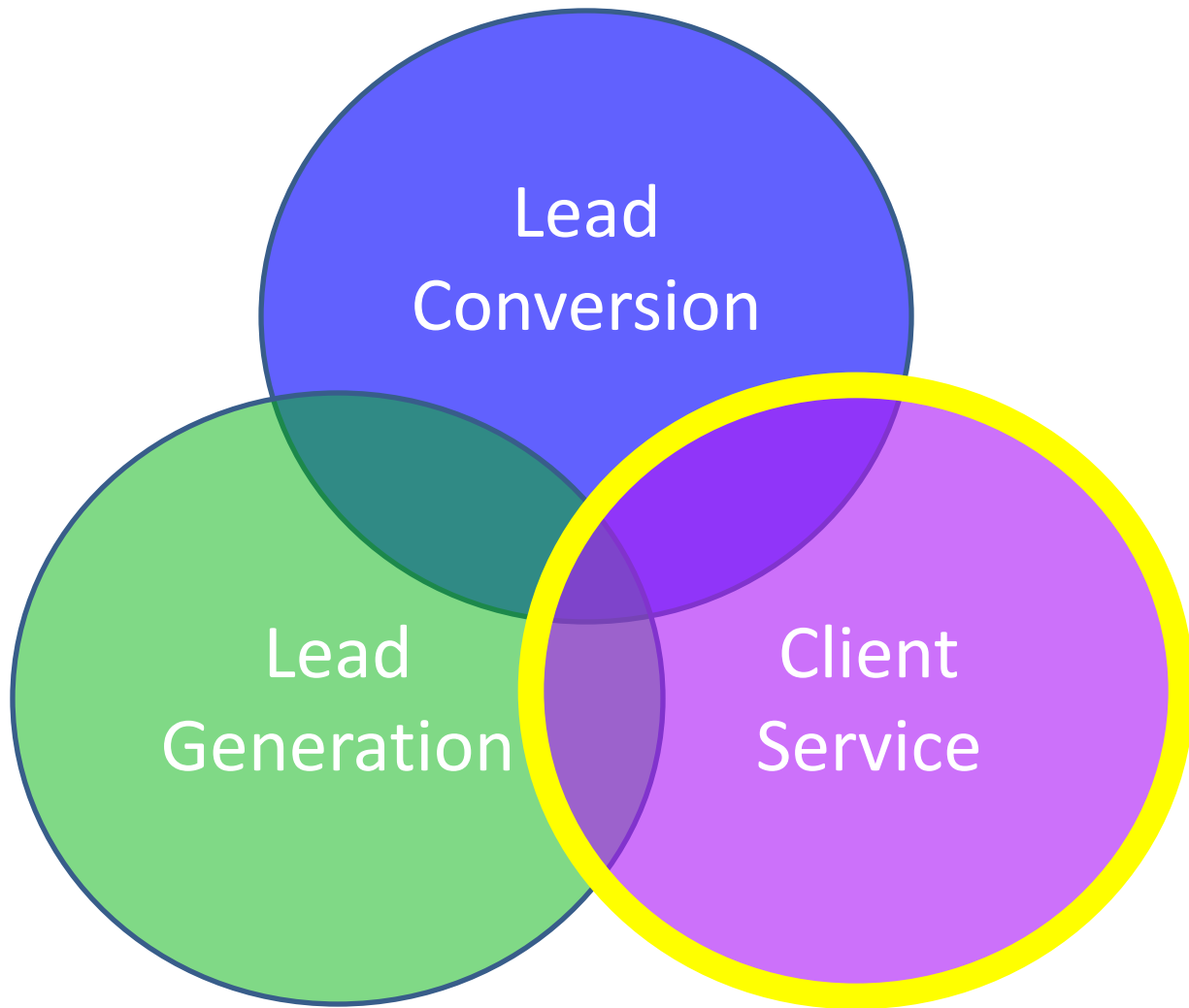
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So what are the skills **required for Financial Advisor Mastery?**









**Unfortunately we
can't cover
everything today**

Items Promised At Bill Bachrach's August 2021 Dojo

AUGUST 6, 2020 (Edit) By Mark Little Filed Under: [Retaining Clients](#)

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www. The**MarkOfMastery**.com/bill-bachrach-dojo Financial Advisors asked me to provide when I spoke live at Bill Bachrach's recent Financial Road Map Workshop (Dojo):

Or just got to the blog & search "Dojo"

1. The 3 Most Important Client Acquisition Skills... [\[click here\]](#)

2. The free Course I promised you which outlines the 10 critical success skills for effective client service: [The Only Game in Town, 10 Game-Changing Strategies For Financial Advisors.](#)

3. My Ideal Client Profile. Here's the Ideal Client Profile I use to filter potential client leads. Feel free to use any or all of the language I'm providing you here... [\[click here\]](#)

4. My strongest recommendation is to begin calculating The Annual Referral Rate™ (TARR) every month.

- Your TARR is the number of referrals provided by your Ideal Clients over the past 12 months, but calculated as a "rate per Ideal Client."
- This calculation is the best and most direct method of measuring client satisfaction.
- You can learn to drive the trend of this rate upwards by focusing on consistently exceeding your Ideal Clients' expectations at every interaction.
- As promised, here's the calculation I recommend you calculate and circulate to your entire internal team each month... [\[click here\]](#)

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™

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

[Discover Referability](#)

