



PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Live Advice Session

October 12, 2021

Mark McKenna Little

Questions

- ✓ What if I can't afford a full time Administrative Manager? Are part-time Admins effective?
- ✓ What are the most valuable Modules in this program?

Question

What if I can't afford a full time Administrative Manager?

Are part-time Admins effective?

Where do I find candidates?

How do I assess them?

The Advisor P.A.C.T. Monthly Program™

5



The Role of the Administrative Manager

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

6



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.

Frequently Asked Questions

Below is a collection of various questions that we hear all the time in relation to our service and working with virtual staff. Please be sure to read through all of these questions and answers before signing up for our service, so that you can really understand the benefits of using the service to save you valuable time when searching for virtual staff.

If after reading through them, you have any further questions, don't hesitate to [contact us](#) directly.

[Get Started](#) →

<https://www.VirtualStaffFinder.com/>

+ How long does your process take, from start to finish?

+ Do you provide part time VAs?

THE Job Board For Virtual Workers In The Philippines

33,873 Jobseekers

Signed Up Last Month.



Search Filipino Resumes



Search for Jobs

MOST RECENT RESUMES CREATED



Customer Service Representative

3 years in Customer Service Support (Team Lead)



Php 30,000.00
(\$600 USD)

[See More](#)

MOST RECENT JOBS POSTED

SEO Content Writer

Full Time

Posted on Oct 12, 2021



\$5-\$6 per hour

<https://www.OnlineJobs.ph/>



Real Estate Virtual Assistant |

Operations, Supervisor (Technical Support)



Php 10,000.00
(\$200 USD)

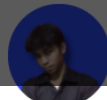
Email Graphic Designer

Full Time

Posted on Oct 12, 2021



\$5-\$6 per hour



Graphic Designer & Video Editor

7 years of experience in Graphic Designing & Video Editing



Php 35,000.00
(\$700 USD)



\$50,000

Digital Marketing Administrator

Full Time

Posted on Oct 12, 2021

Build your business with top freelancers

Post a job for free and connect with independent talent today.

[Get Started](#)

Amy B. | Top Rated Freelancer

Trusted by



AUTOMATTIC



COTY



Hire for any scope of work

Short-term projects

Find go-to talent who get your needs

Recurring engagements

Build trusted relationships with skilled professionals

Long-term work

Expand your organization's capabilities

https://www.UpWork.com/

Find freelance talent to take on any project

United States

Worldwide



Susan H.
Copyeditor *
Proofreader * Writer



Ashneal P.
Scripts * Automation *
Python * Discord Bots



Laurel K.
Professional Editor *
Published Writer *



Tracey I.
QuickBooks Online
Bookkeeping * Profit

The Advisor P.A.C.T. Monthly Program™

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Question

What are the most valuable Modules in this program?

There's a lot in this program, what are the highlights? Are there any fundamental principles?

The Advisor P.A.C.T. Monthly Program™

The **objective** of this program is to fully implement Truly Comprehensive Financial Services™ in a way that ***exceeds*** your Ideal Clients' expectations

The **measure** of success is a ***continually*** increasing client referral rate

The Advisor P.A.C.T. Monthly Program™

The 5 MOST Important **Concepts**

The Advisor P.A.C.T. Monthly Program™

1



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.

6



Hiring an Extraordinary Administrative Manager

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7



The Deliverables Team Recruitment Process

Acquire your next Deliverables Team member in 12 simple steps.

The Advisor P.A.C.T. Monthly Program™

14



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.

15



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.

The Advisor P.A.C.T. Monthly Program™

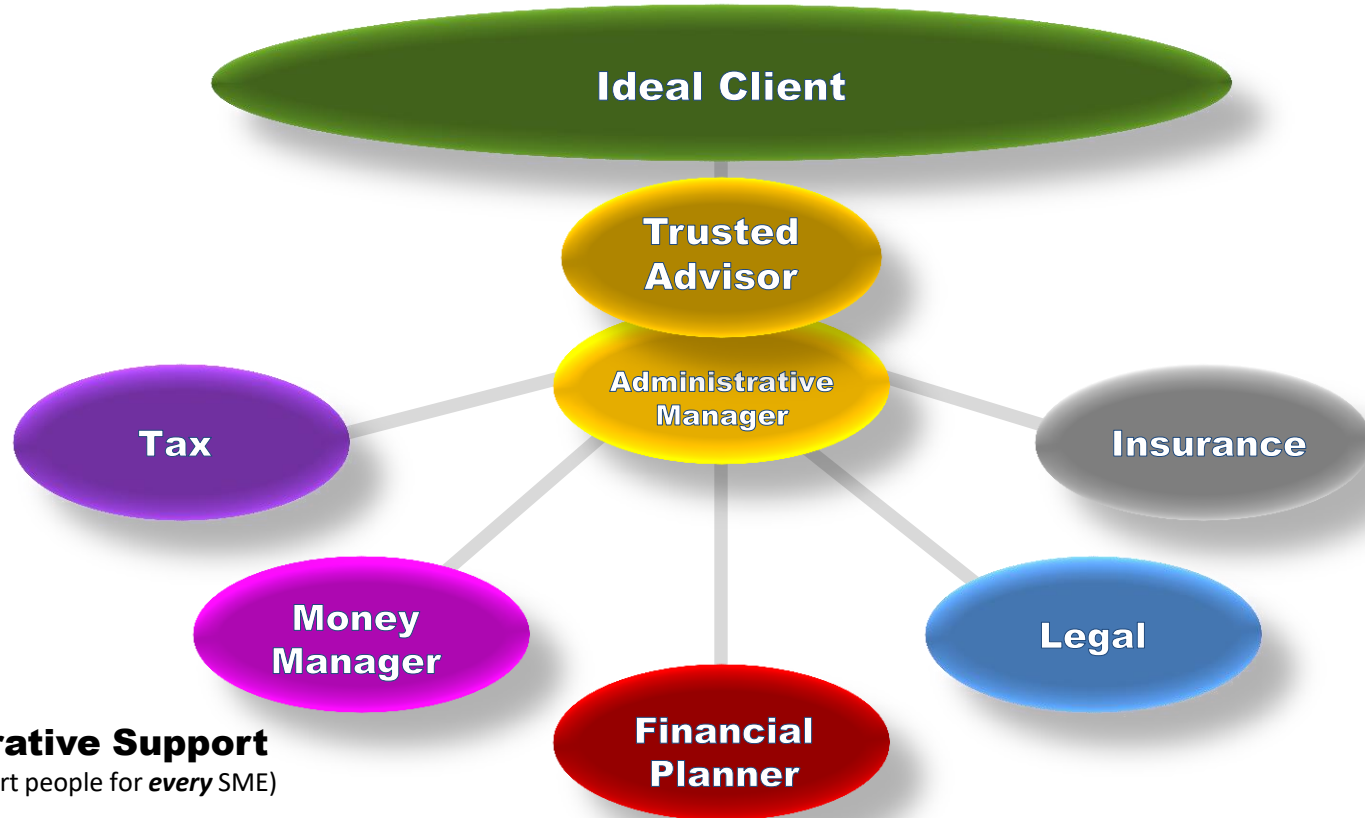
Here are the
3 fundamental **Principles**

The Advisor P.A.C.T. Monthly Program™

1

First, Get Your Team In Place
(Starting with a **STRONG** Administrative Manager)

Our Deliverables Team Structure



Administrative Support
(Min. of 2 support people for *every* SME)

The **60-Day** Deliverables Team Recruitment Process™

The key to delivering
Truly Comprehensive
Financial Services™

The 12-Step Deliverables Team Recruitment Process™

1 Establish Your Next Subject Matter Expert To Acquire 	2 Create Your Best- in-Class Profile 	3 Create a List of Candidates 	4 Initial Candidate Research 
5 The Research Call 	6 Scheduling The Initial Discovery Meeting 	7 The Initial Discovery Meeting™ 	8 The Best-in-Class Assessment Meeting™ 
9 The Internal Agreement Meeting 	10 The Deal Structure Meeting™ 	11 Finalize Agreement 	12 Obtain SME Agreement Form 

OBJECTIVE: Fill each
SME Vacancy
in **LESS THAN** 60-days

If it takes longer, then
you'll need a stronger
Administrative
Manager

The Advisor P.A.C.T. Monthly Program™

2

Second, Insist that each Deliverables
Team Member **contributes** to
The Team Goal

The Team Goal

The Team Goal is to consistently exceed
every Ideal Clients' expectations.

All Subject Matter Experts, individually and collectively,
agree to **contribute** to this goal.

The goal is measured by The Annual Referral Rate™ (TARR)
continually increasing.

The Advisor P.A.C.T. Monthly Program™

SME **MINIMUM** STANDARD

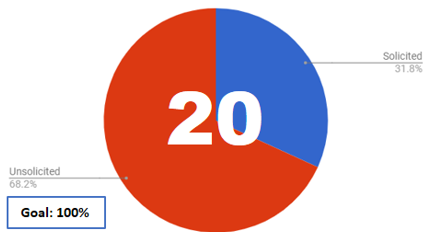
I expect every SME to provide
a minimum of 3 impressive Action
Items or Recommendations prior to
every client progress meeting

The Advisor P.A.C.T. Monthly Program™

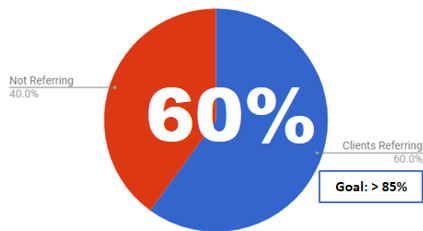
3

Third, hold your Subject Matter
Experts accountable to
The Referability Dashboard™

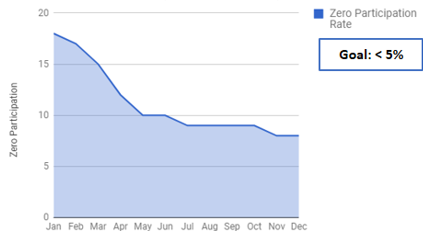
Referrals Received Last Month



Participation Rate



Clients Not Referring at All (Zero last 12 months)

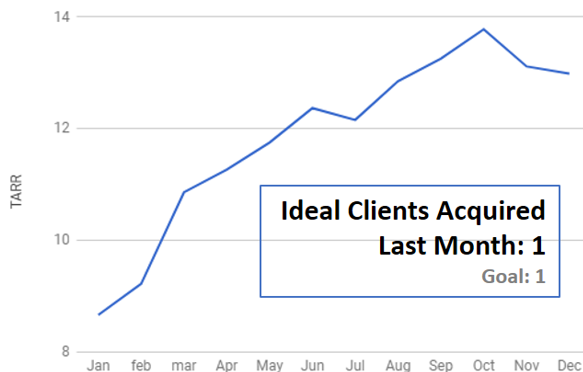


The Annual Referral Rate™ (TARR) December 2017

12.987

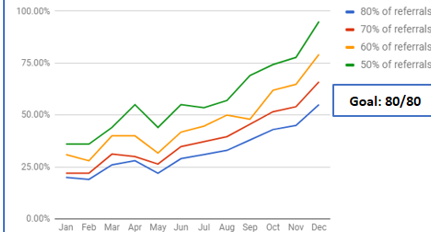
Our Current
TARR Goal: 15.0

The Annual Referral Rate History

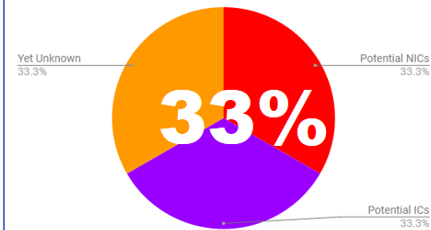


	Count or Ratio
# Referrals Last 12 Months	259
Average # Referrals per month	21.583
# Referrals per Initial Client Interview™	12.248 : 1
# Initial Client Interviews™ per Ideal Client	7.8 : 1
# Referrals per Ideal Client	95.534 : 1

The Crucial Few™: What % of Ideal Clients are responsible for our referrals?



Quality of Referrals Last Month



Impressed Ideal Clients



The Advisor P.A.C.T. Monthly Program™

We're
The *Only* Game in
Town

Get the advice you're paying for in The Advisor P.A.C.T. Monthly Program™.

“Contact Us” with *every* issue you're struggling with



Mark McKenna Little

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

www.TheMarkOfMastery.com

<https://themarkofmastery.com/>

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

Explain your biggest
problem or obstacle
and I'll give you my
advice based on
what I've done in
your situation



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