



PROTECTION ATTENTION COORDINATION TRANSPARENCY

# **The Monthly Session**

## Monthly Live Advice Session

April 19, 2022

With Host Mark McKenna Little



# **Your** **ADVISOR** **PACT**

**PROTECTION**  
**ATTENTION**  
**COORDINATION**  
**TRANSPARENCY**

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



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

Mark McKenna Little

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

[www.TheMarkOfMastery.com](http://www.TheMarkOfMastery.com)

<https://themarkofmastery.com/>

# Question

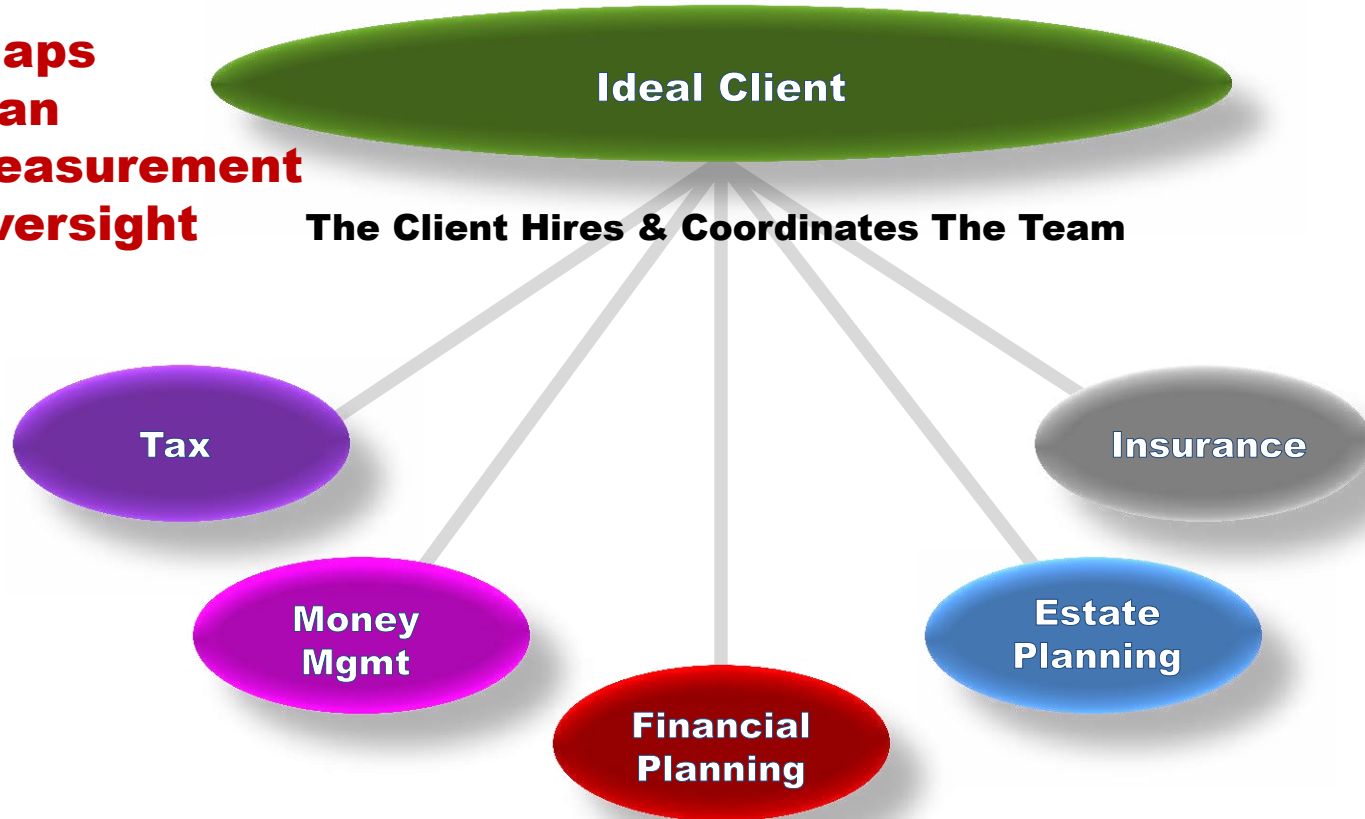
You mentioned that the most important module in this program is the process for filling my service team vacancies, could you give a preview of that module?

I'm curious how long it will take to build my team, so I may begin charging Ideal Clients \$35,000/year

# The Traditional Financial Services Business Model

## Usual Gaps

- ✓ No Plan
- ✓ No Measurement
- ✓ No Oversight





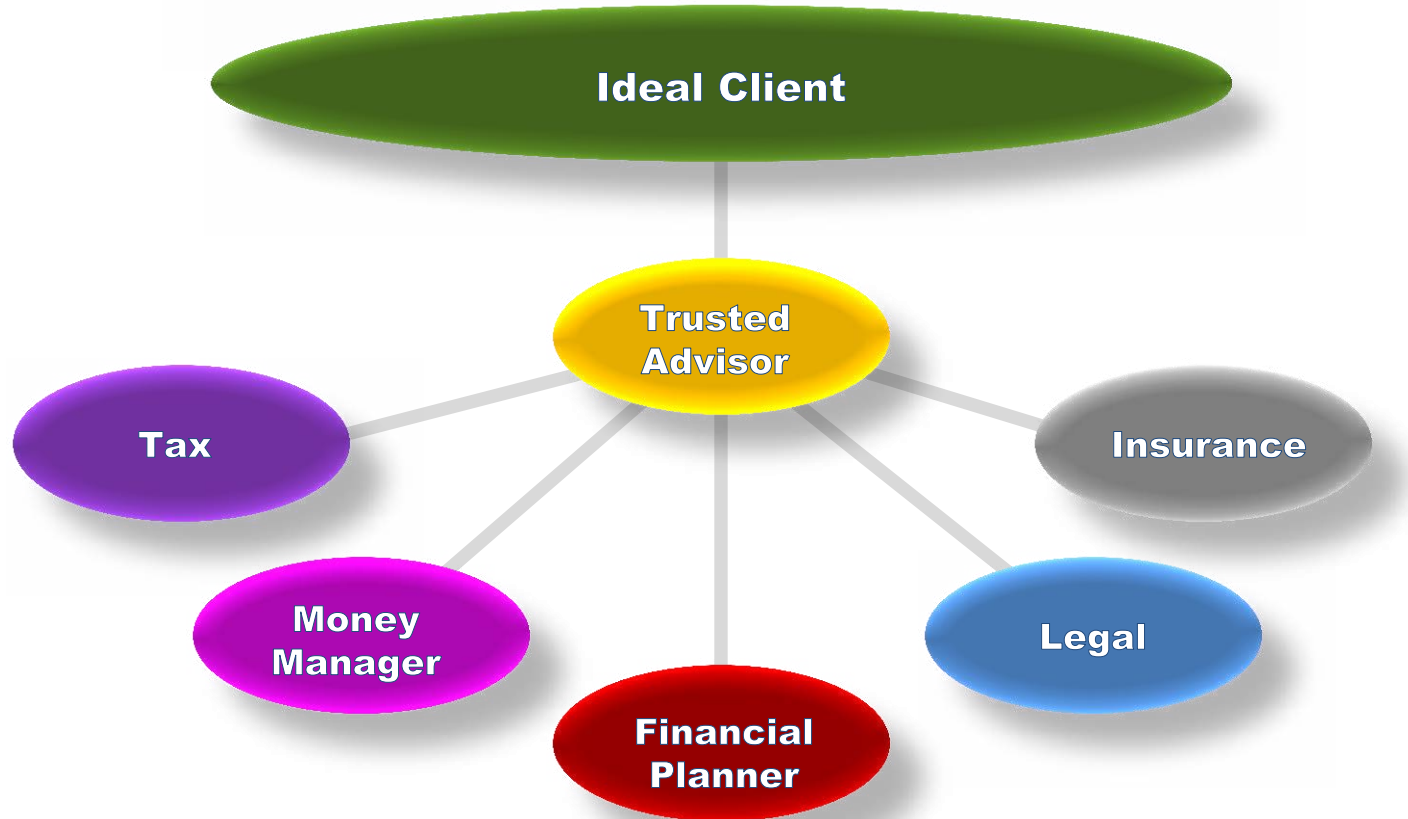


# **Truly Comprehensive Financial Services™**





# **Different** **Our Deliverables Team Structure**





## The Three Meeting Process™



### The Initial Client Interview™ Client Meeting #1 Best Result:

Establish where you are now, and the specific goals you want to accomplish so you can focus on the things that matter most to you.

Target: 14 Days

### The Implementation Meeting™ (IM) Take Action On Your Plan Best Result:

- Begin implementing your comprehensive lifetime written financial plan
- Review your lifetime CPS Action-Plan for every year of your life for which you have set a recommended action

Target: 45 Days

### The Initial Progress Update Meeting™ (IPU) Following on Actions Taken - Revisit lifetime progress since The Implementation Meeting on your written plan.

### The Comprehensive Safety Review™ (CSR) Address Every Risk to Your Plan Best Result:

- Recommendations from full review over review:
  - Review of Key Program Elements
  - Review your CPS Action-Plan

Target: 45 Days

Target: 4 Months

Target: 4 Months

### The Annual Review™

Update your comprehensive lifetime written financial plan

Best Result:

- Review recommendations from the comprehensive written strategy for Cash Resources
- Review recommendations from the comprehensive written strategy for Debt
  - Review of Key Program Elements
  - Review your CPS Action-Plan

Target: 4 Months

### The Goal Progress Outlook™ (GPO)

Measure Your Progress Against Your Goals  
Best Result:

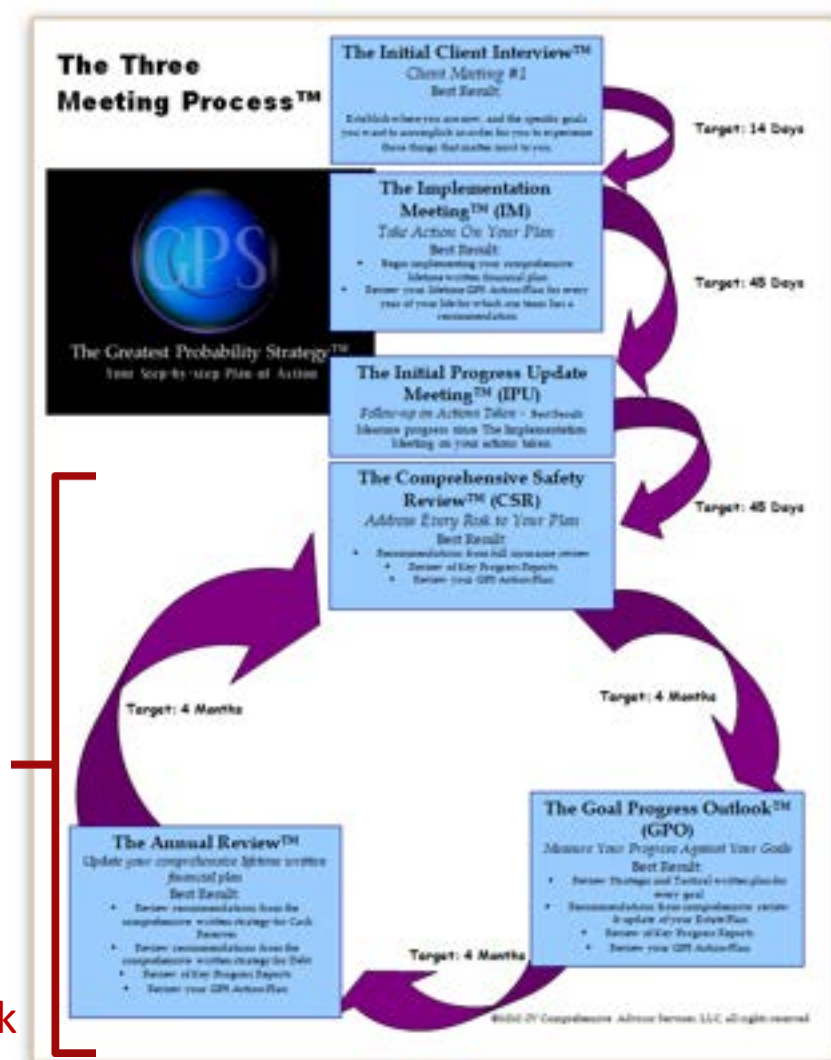
- Review Strategic and Tactical written plan for every goal
- Recommendations from comprehensive review to update of your Action-Plan
  - Review of Key Program Elements
  - Review your CPS Action-Plan

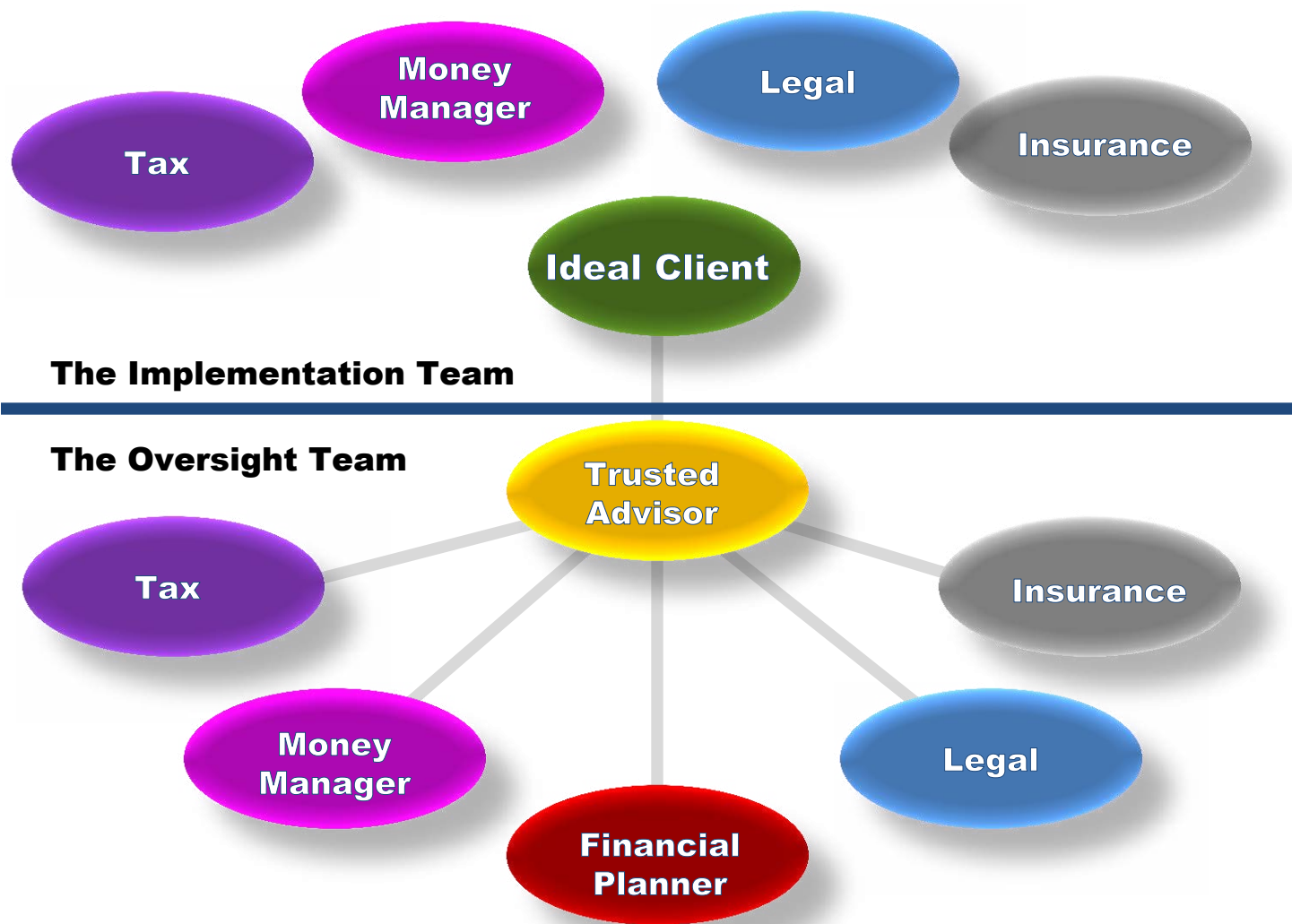
Create a comprehensive written lifetime financial strategy (104 days creating an overarching plan)

Meet 3X per year,  
once every 4-months  
...FOREVER

Deliver Truly  
Comprehensive  
Financial Services™

Ensure goals are  
on-track & stay on-track

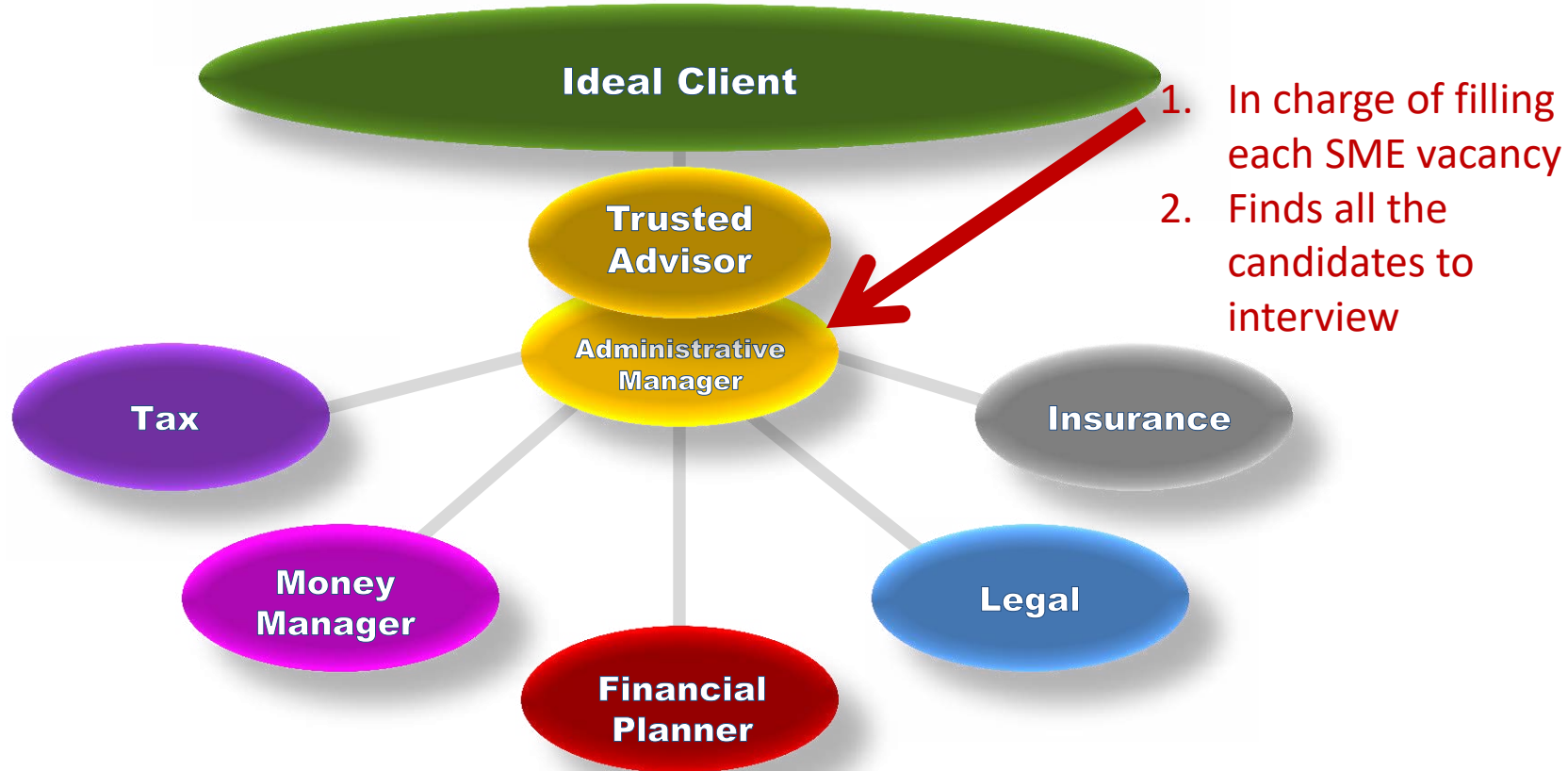




# First, you'll need a **STRONG** Administrative Manager

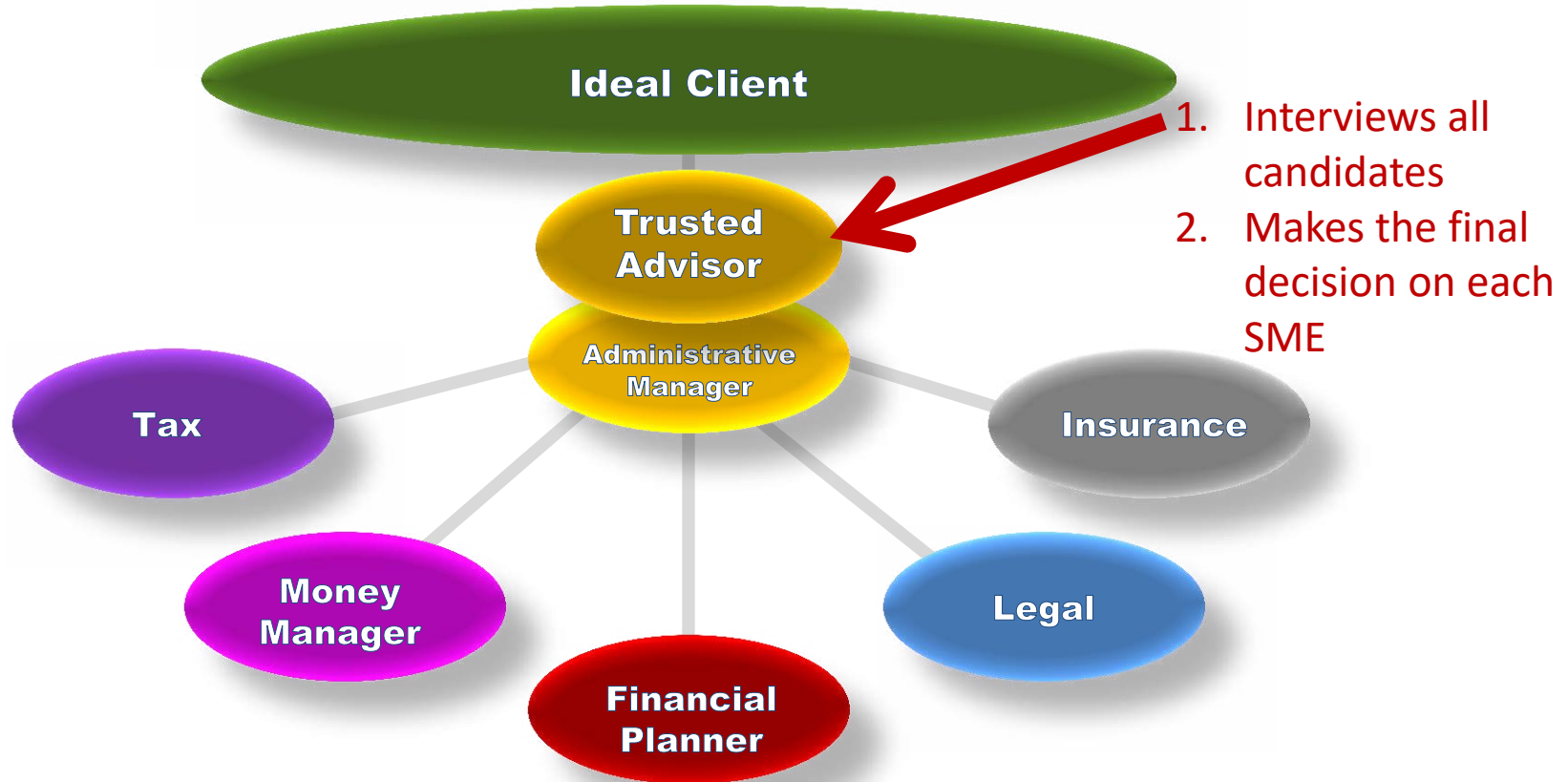
A Project Leader who can hold you accountable

# Our Deliverables Team Structure





# Our Deliverables Team Structure





Second, fill all  
5 **Interim** Subject  
Matter Expert roles

This will take just 1 – 2 weeks

Filling the  
5 **Interim** SME roles is  
quicker because it turns  
the process upside-down  
So let's review the **full** process first

# Ground Rules for filling **Permanent** SME Vacancies

- ✓ Administrative Manager “manages the process” (not TA)
- ✓ Fill one (1) SME vacancy at a time
- ✓ AM is accountable for filling the vacancy in 60-days or less (litmus test)
- ✓ AM manages & updates the week-by-week project checklists (you’ll know that you’re on-track every week)

## 12-Step Process For Recruiting Subject Matter Experts



# The Deliverables Team Recruitment Process™

# 12-Step Process For Recruiting Subject Matter Experts



Identify  
SME Role





Create a  
best in class  
profile



Develop  
Candidate  
List





Initial Research



Research Call



Schedule  
Meeting



The Initial  
Discovery  
Meeting™



The Best in Class  
Assessment  
Meeting™

Internal  
Agreement  
Meeting



The  
Deal Structure  
Meeting™



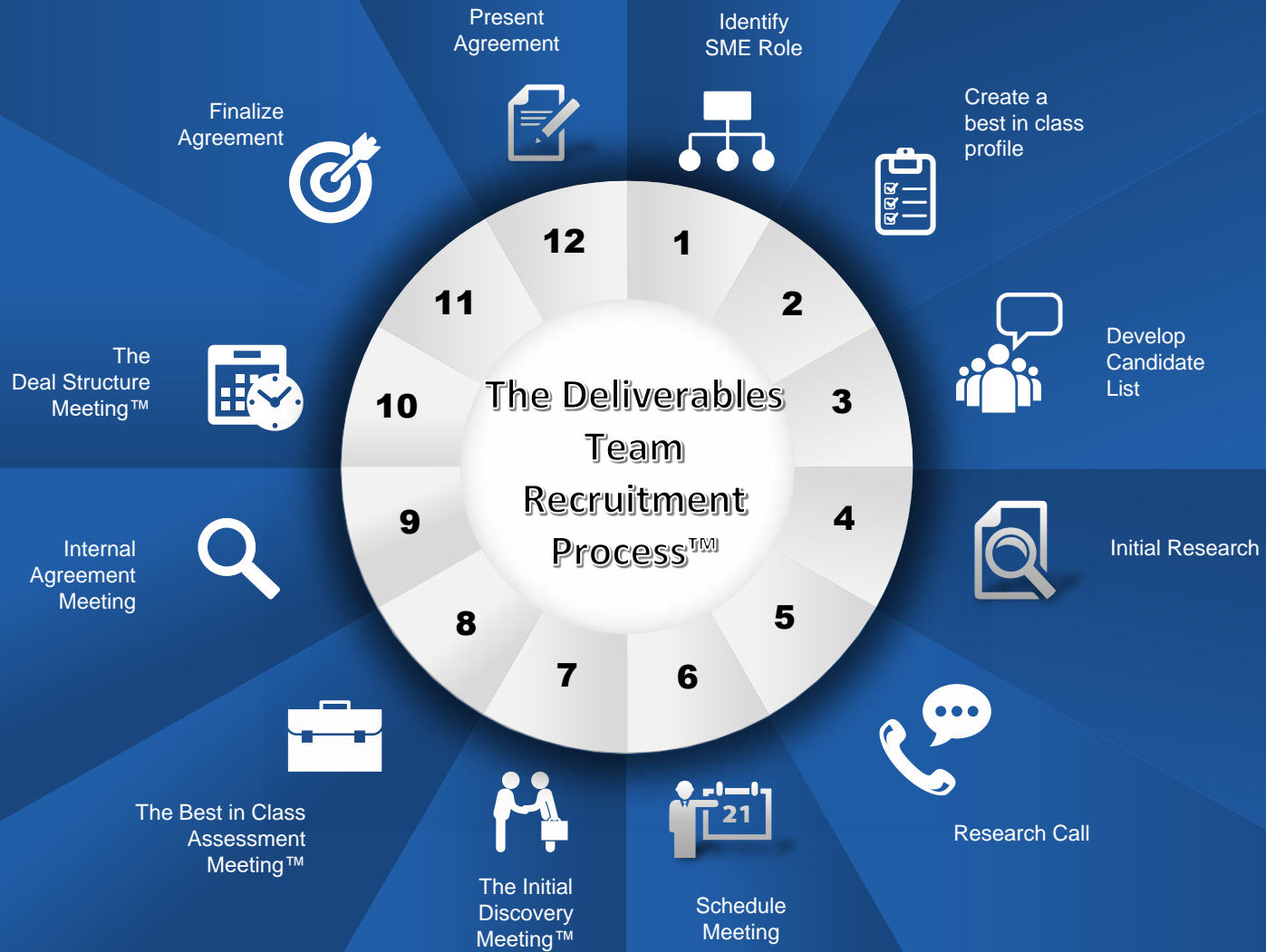
Finalize  
Agreement





Present  
Agreement





# Let's review your **Week-by-week** Checklist

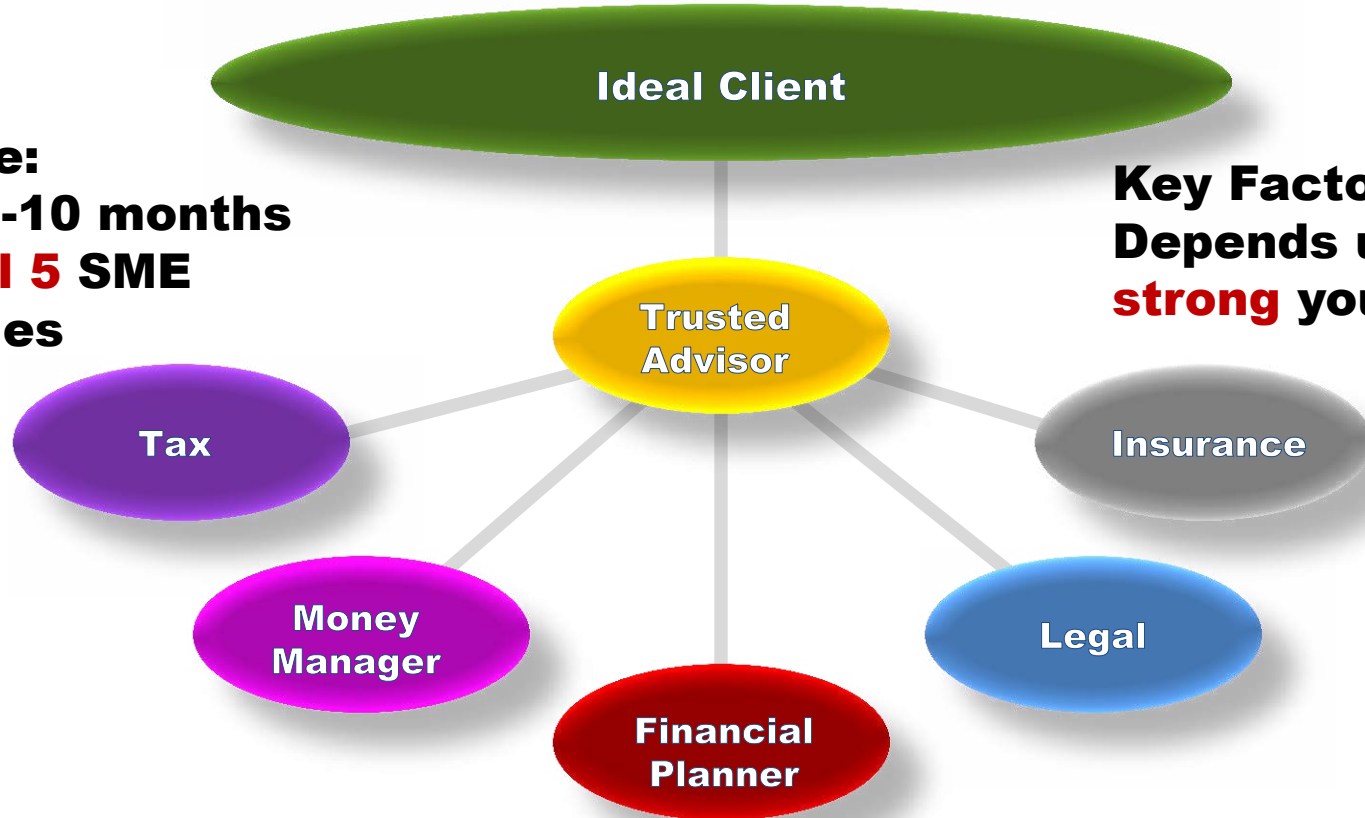
Your Administrative Manager is responsible for  
staying on track each week

[DTRP] SME Daily and Weekly Tracking - TEMPLATE												
File Edit View Insert Format Data Tools Extensions Help Last edited: 10/1/2019 10:00 AM												
Weekly DTRP Project Activity For												
Weekly DTRP Project Activity For <b>AM Name</b>  Date Range For Entire Project to BE this vacancy <b>DATE</b> (Target <60 days)  SME Role Being Filled <b>SME</b>	Date For This Week (Week Beginning on this Date) # Candidates Identified this week (The # added to TA Call Log <b>this week</b> ) Total # SME vacancies identified by AM since "Start" (Total number of randoms added to TA Call Log <b>since the inception of this project</b> ) # Candidates TA screen with this week (Total number of TA interviews with Candidates this week) # EOs Scheduled This week by TA # EOs <del>submitted</del> completed this week by TA # BCAs <del>submitted</del> completed this week by TA Total # of "True" Candidates currently being considered (end of week count) and if week started Total # of "Major" Candidates currently being considered (end of week count) Total # of "Hot" Candidates <del>submitted</del> after TA interview (end of week count)  Note all the Major DTRP Project accomplishments for this week (what happened to move this project forward this week?)											
Project Week #1	Sunday, July 14, 2019											
Project Week #2	Sunday, July 21, 2019											
Project Week #3	Sunday, July 28, 2019											
Project Week #4	Sunday, August 4, 2019											
Project Week #5	Sunday, August 11, 2019											
Project Week #6	Sunday, August 18, 2019											

# To fill all your 5 **Interim** SME vacancies **first**, just turn the process upside down (it's quicker)

- ✓ **Shortcut:** You're seeking **ONLY** technical competence (less concerned about their ability to impress Ideal Clients)
- ✓ **Requirement:** Your interim SME agrees to generate **5 skilled** Action Items or recommendations prior to **every** Dry-Run Prep Meeting™
- ✓ **Quality Control:** Access to only 1 Ideal Client at a time ...assess after each

# Our Deliverables Team Structure



**Timeline:**  
**Takes 5-10 months**  
**to fill **all 5** SME**  
**vacancies**

**Key Factor:**  
**Depends upon how**  
****strong** your AM is.**

# Relentless Focus On **The Team Goal**

- ✓ Our goal as a team is to **consistently exceed** our Ideal Clients' expectations
- ✓ Lagging indicator: An **increasing** annual client referral rate
- ✓ Leading indicator: I expect **every** SME to provide **3-5 Action Items or recommendations** prior to every Dry-Run Prep Meeting™

# The premise behind my success...

- ✓ Client referrals are the **best** and most direct method of measuring client satisfaction
- ✓ Everyone is a potential **referral source** (EVERYONE means both clients & non-clients ...LEIK)
- ✓ So, get the people you know to introduce you to people you don't know (develop **personal** relations)
- ✓ Everyone can help you if they want to (So, add value to **every** relationship so everyone wants to help you)



You are here: [Home](#) / [Contact Us](#)

## Contact Us

Here are your best options to gain a timely response from our team.

### For Current Clients Only:

[Click Here to Leave a Voice Message for Mark](#) if you require his advice and he will provide a voice response (delivered to your inbox).

*Often preferable over email, especially if the question (or answer) requires detailed explanation.*

### For Anyone (clients or non-clients):

[Click Here to Book a 1-On-1 Meeting with Mark](#) at \$8.33/minute (book 20, 40 or 60 minutes).

*Ideal for financial advisors who want advice on a particular issue without joining a monthly coaching program.*

For all other inquiries, questions and support requests, please use the form below:

Email is our primary communication method, however we *may* try to contact you by phone if the

### News

[Holiday Closure - February 21, 2022](#)

Feb 21, 2021

[Holiday Closure - January 17, 2022](#)

Oct 17, 2021

[More news...](#)

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