

ADVISOR | PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Live Advice Session

May 17, 2022

With Host Mark McKenna Little



Summary

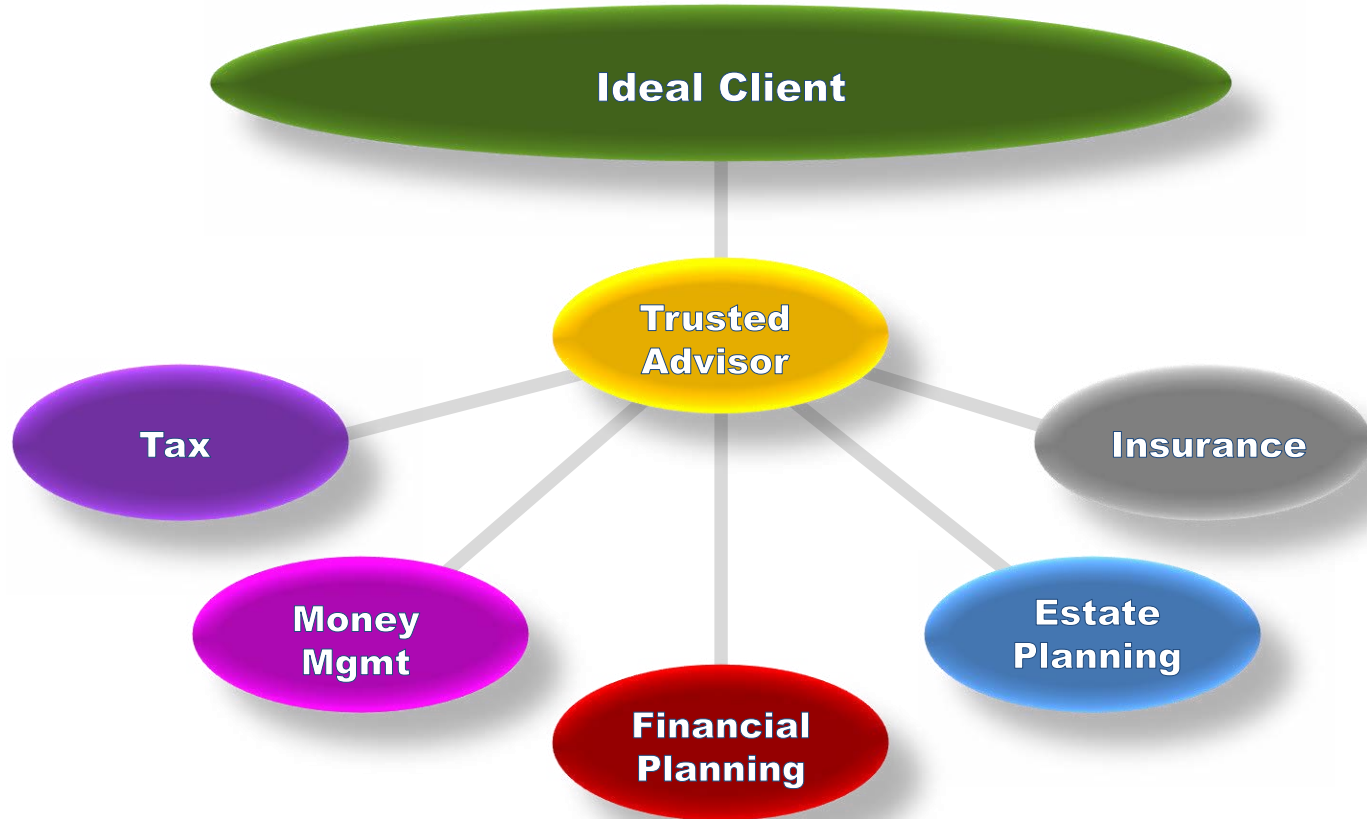
The **Mark** of Mastery™

- ✓ **Resolve:** What standard of client service do you **REALLY** want?
- ✓ **Execute:** Implement your standard w/ systems & people.
- ✓ **Leadership:** Hold everyone accountable to your standard.

Question

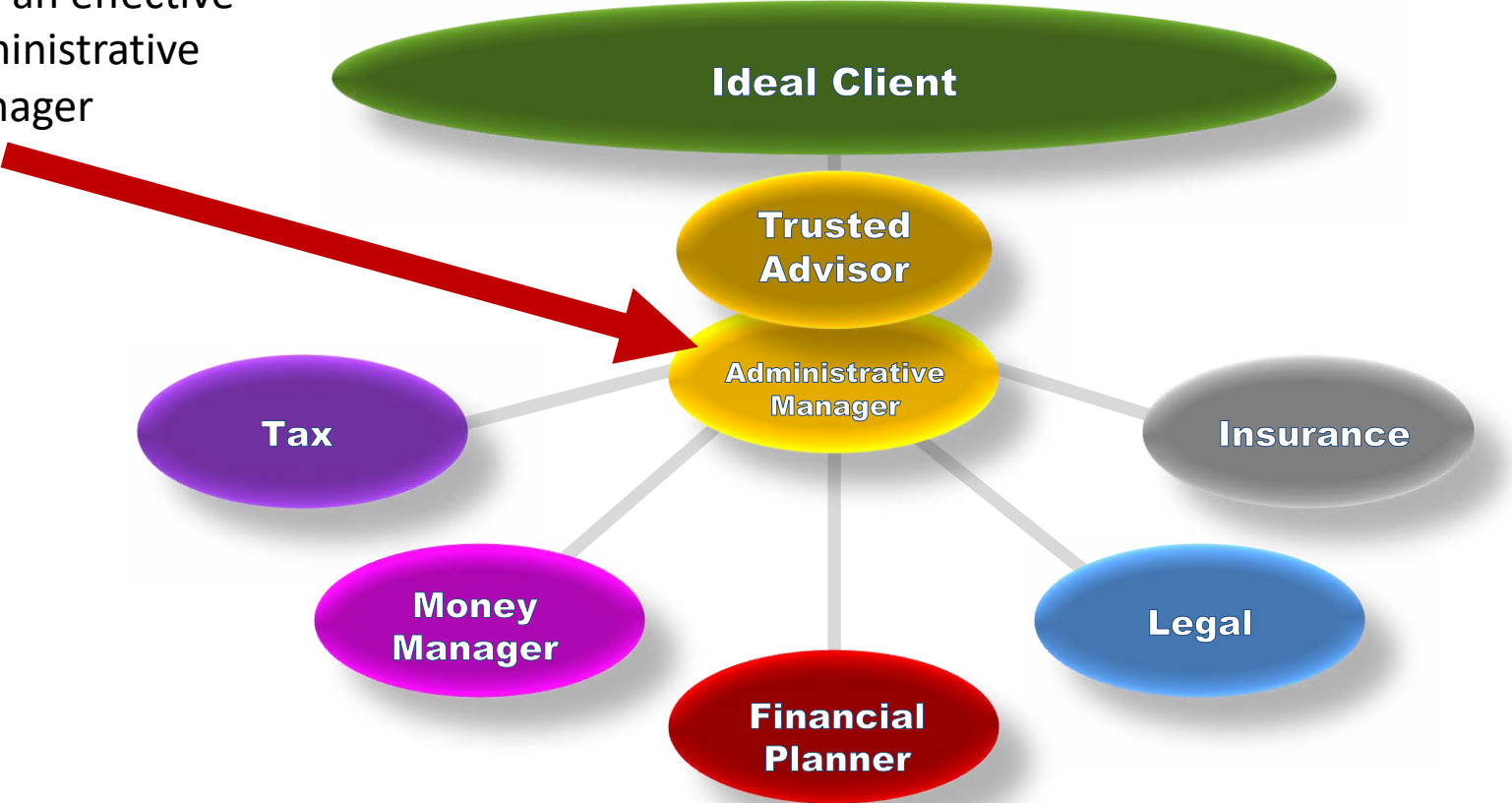
What are then next couple of steps I should take to get this service model up and running that will consistently exceed Ideal Clients' expectations?

Our Business Model is different




Our Deliverables Team Structure

Hire an effective
Administrative
Manager



1

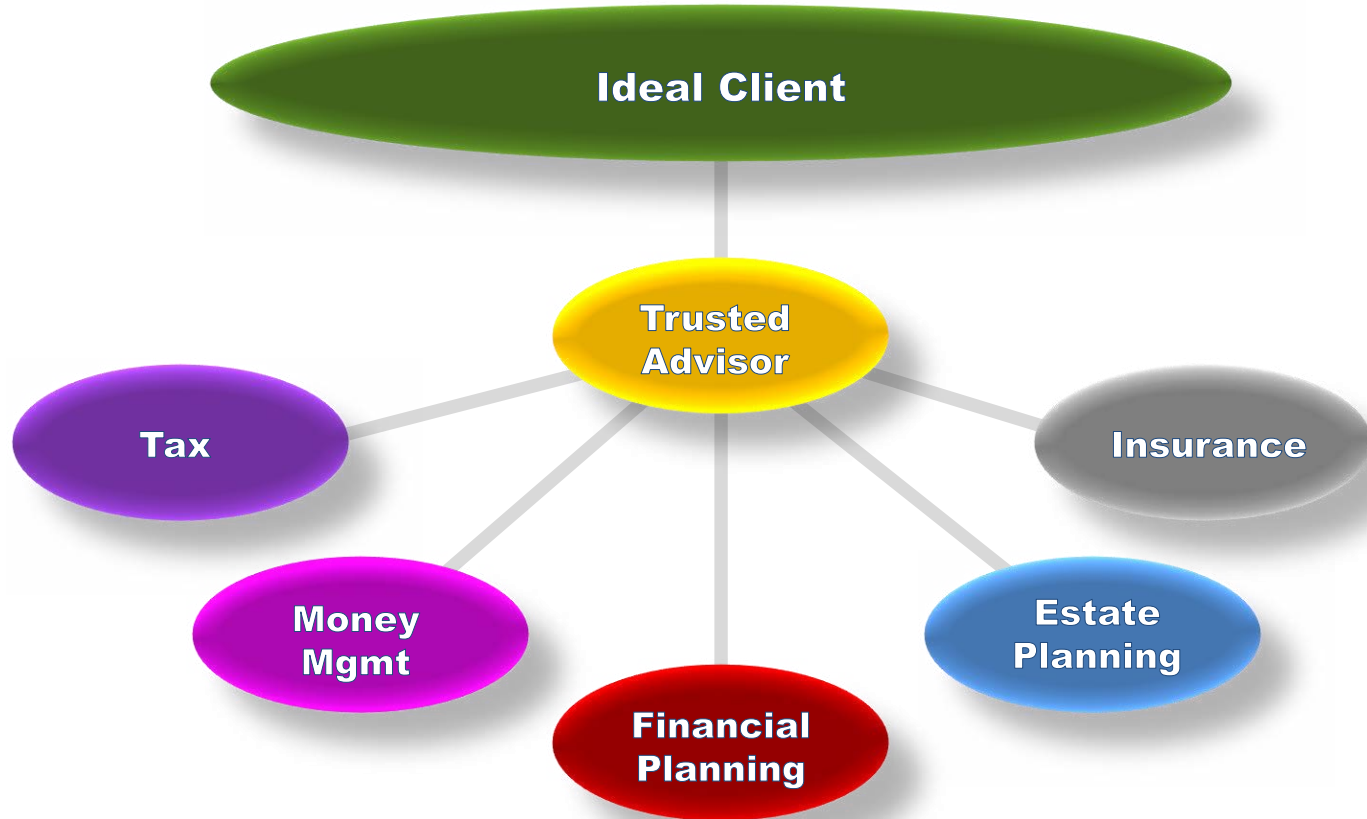
An **Effective** Administrative Manager

- ✓ Fill SME **Vacancies** ← 
- ✓ **Coordinate** SMEs
- ✓ **Prioritized** Action List (PAL)

2

AM responsible for filling all
5 SME Vacancies with
INTERIM SMEs
(within the next 2-weeks)

Our Business Model is different



Division of Labor in Filling Vacancies

Administrative Manager

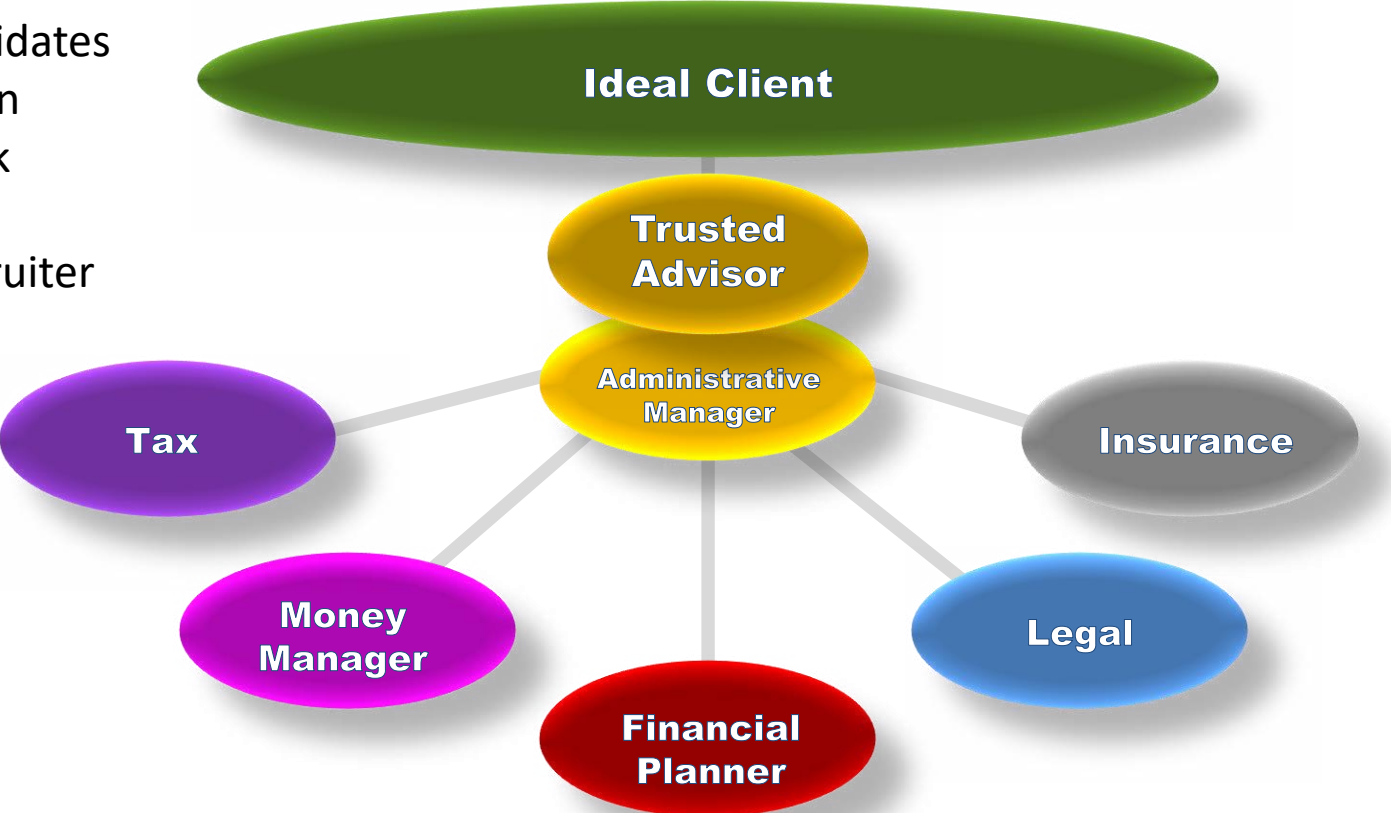
- ✓ Responsible for the **deadline**
- ✓ **Finds** SME Candidates

Trusted Advisor

- ✓ Interviews **all** candidates
- ✓ Makes the **final** decision

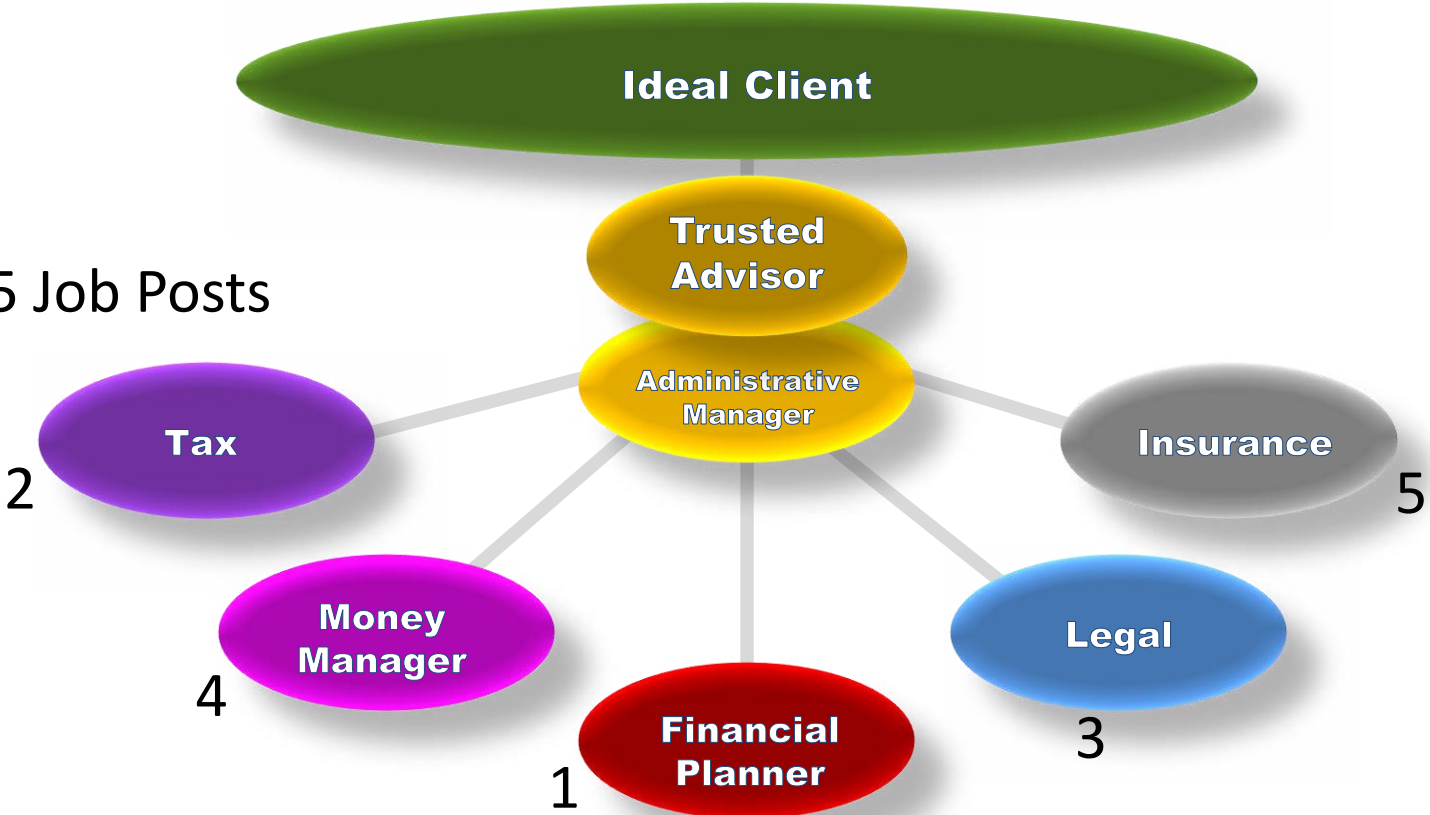
Our Deliverables Team Structure

- INTERIM
- SME Candidates
 - ✓ LinkedIn
 - ✓ Upwork
 - ✓ Indeed
 - ✓ ZipRecruiter



Our Deliverables Team Structure

Create 5 Job Posts



Filling **INTERIM** SME Vacancies

Week 1

- ✓ Financial Planning Subject Matter Expert
- ✓ Tax Planning Subject Matter Expert

Week 2

- ✓ Estate Planning Subject Matter Expert
- ✓ Money Management Subject Matter Expert
- ✓ Insurance Subject Matter Expert

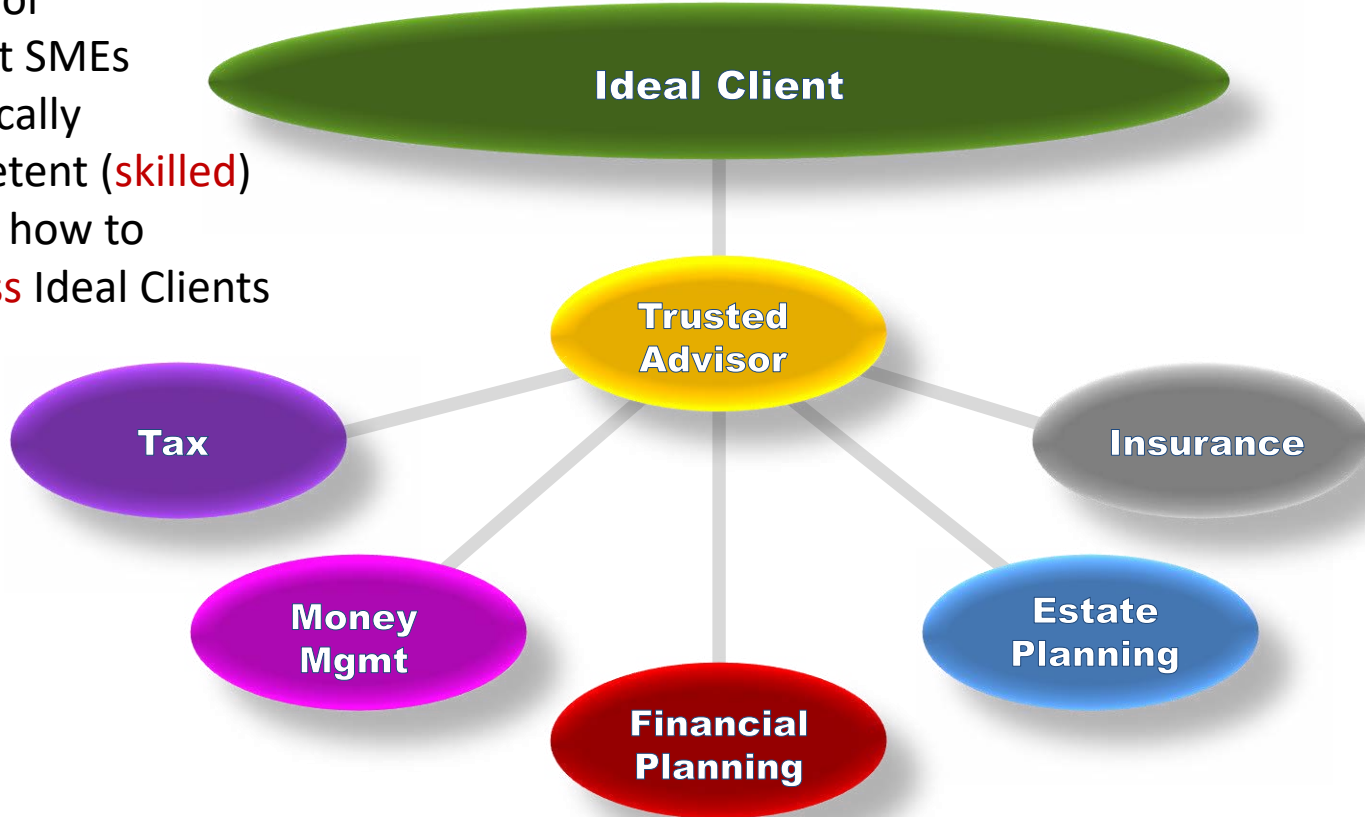
3

Fill **Permanent** SME Vacancies
(30-60 days x 5 SMEs)

Our Business Model is different

2 Criteria for
Permanent SMEs

1. Technically
Competent (**skilled**)
2. Knows how to
impress Ideal Clients



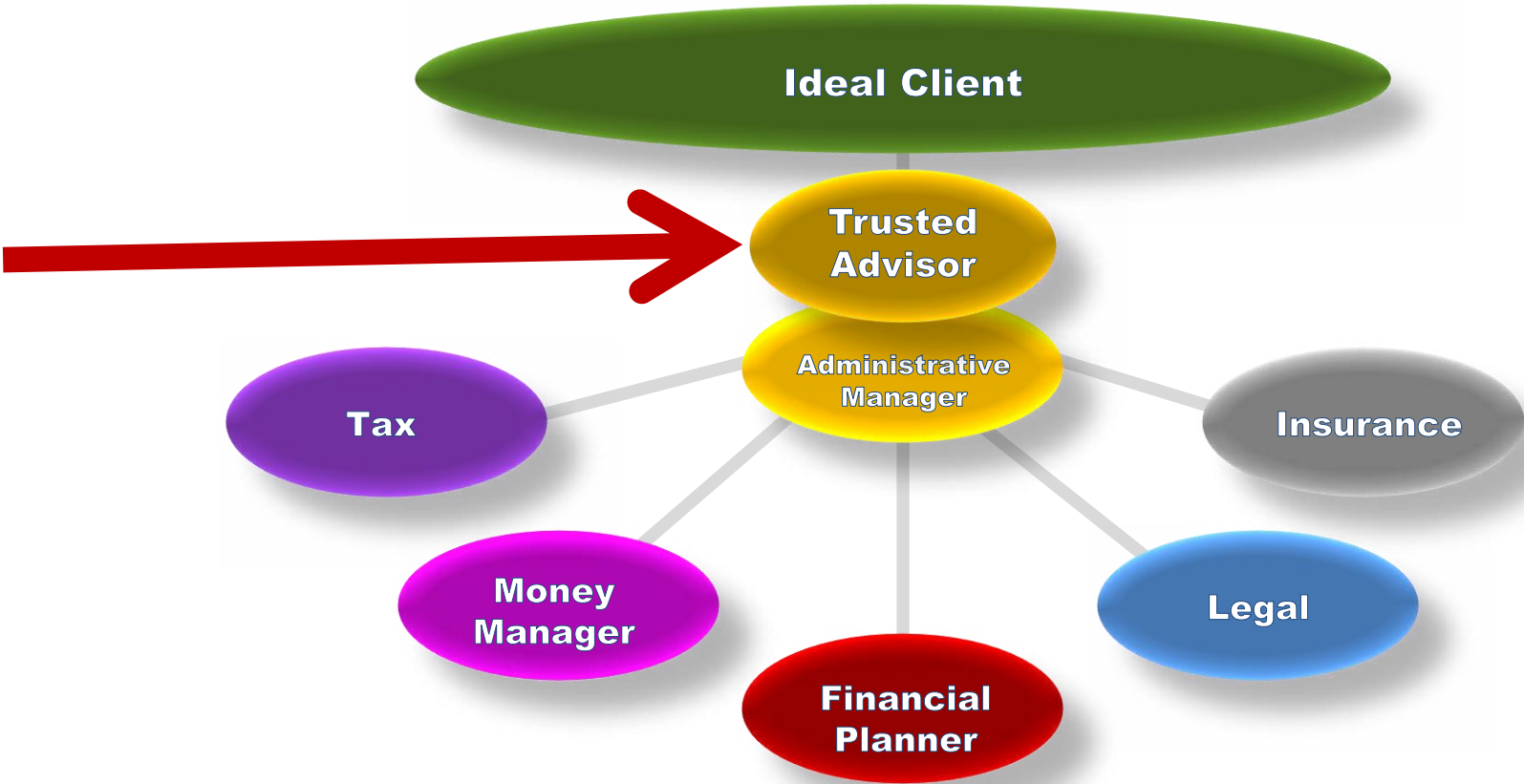
Your 1st Three Steps

1. Hire an **effective** Administrative Manager
2. AM Fills **all 5** INTERIM SME roles in 2-weeks.
3. AM responsible for filling **PERMANENT** SME roles, one-at-a-time (30-60 days each)

Benefits of our model

1. Can accept Ideal Clients **immediately**
2. Administrative Manager is responsible for filling all SME **Vacancies**
3. SMEs are responsible for **100% of client service**

Our Deliverables Team Structure



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

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