

ADVISOR | PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Advice Session

January 17, 2023

With Host Mark McKenna Little

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Welcome to Advisor PACT™ Monthly

Congratulations—you've taken the first step towards delivering Truly Comprehensive Financial Services by joining the Advisor PACT™ Monthly program.

First Steps

Before diving into your first module, we recommend reviewing some of the basics of the Advisor PACT philosophy that drives all of our courses and content. Block two hours on your calendar to watch the video below in its entirety, in which Mark walks through the 4 things that every client wants from a financial advisor, but can't find anywhere.



ADVISOR PACT™

The 4 things clients will gladly pay you
\$50,000/year to do

Upcoming Events

[Monthly Q & A Session \(Nov 2022\)](#)

Nov 15, 2022 08:00 AM - 09:00 AM — Webinar

[Monthly Q & A Session \(Dec 2022\)](#)

Dec 20, 2022 08:00 AM - 09:00 AM — Webinar

[Monthly Q & A Session \(Jan 2023\)](#)

Jan 17, 2023 08:00 AM - 09:00 AM — Webinar

[Upcoming events...](#)

News

[Holiday Closure: December 24, 2022 - January 1, 2023](#)

Nov 01, 2022

[Holiday Closure - November 24, 2022](#)

Aug 24, 2022

[AdvisorPACT \(and Toolkit\) NOT Affected by the Log4j Vulnerability Discovered Last Week.](#)

Dec 15, 2021

[The Referability Dashboard™ \(TRD\) Has Been Updated](#)

May 21, 2021

[NOW LIVE: Replay of December's Group Coaching Webinar](#)

Dec 15, 2020

[More news...](#)

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

Questions

- ✓ Update on your tracking spreadsheet: [TRACKING] External Referability
 - ✓ APM is focused on Client Service (exceeding Ideal Clients' expectations)
 - ✓ I'm willing to begin coaching on Client Acquisition, only if most of you track your activity
- ✓ Your tracking folder
 - ✓ THIS MONTH'S FOCUS: PROJECTS: Prioritized Project Status Update
 - ✓ Your Weekly Project Status Update Report
- ✓ I'd like to get some feedback on some best ways to develop new clients in a new territory
 - ✓ It's approximately 1-1/2 hours from where I currently live, but I plan on moving to in another 2-3 years.
 - ✓ Can this done via webinars or should it be done by in-person meetings. Any and all feedback would be appreciated.

Question

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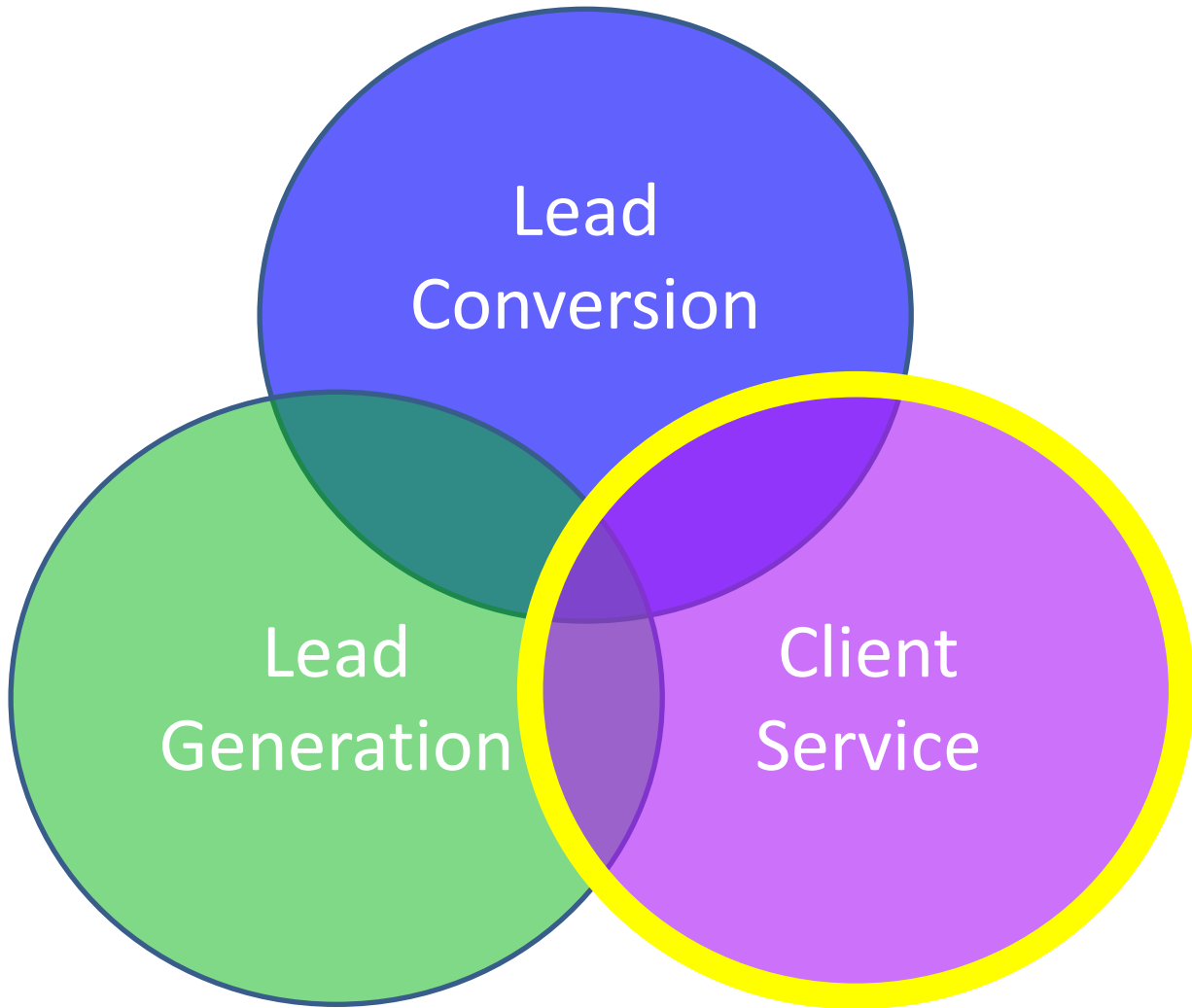
A New Financial Advisor Paradigm

Protection

Attention

Coordination

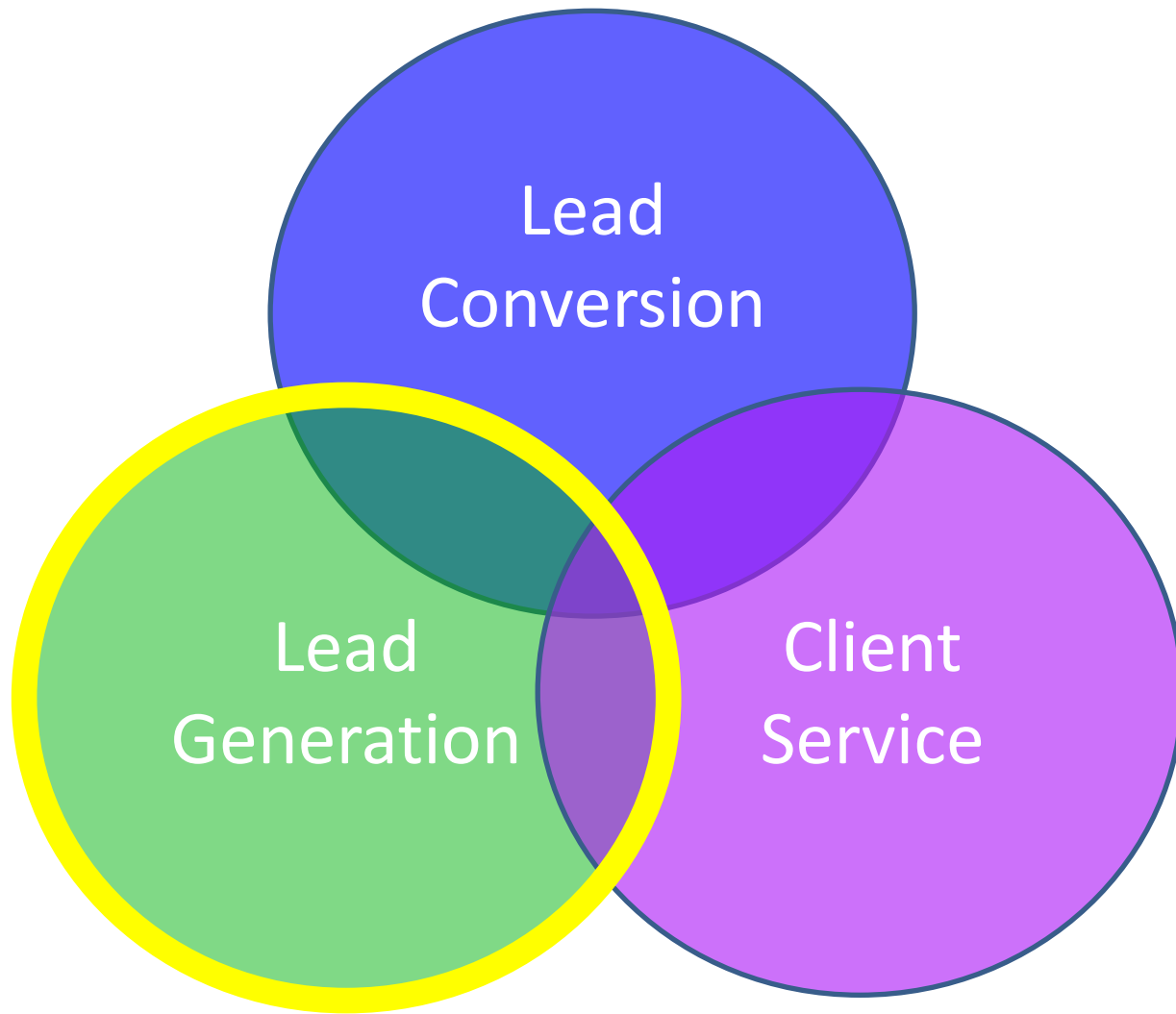
Transparency



Lead
Conversion

Lead
Generation

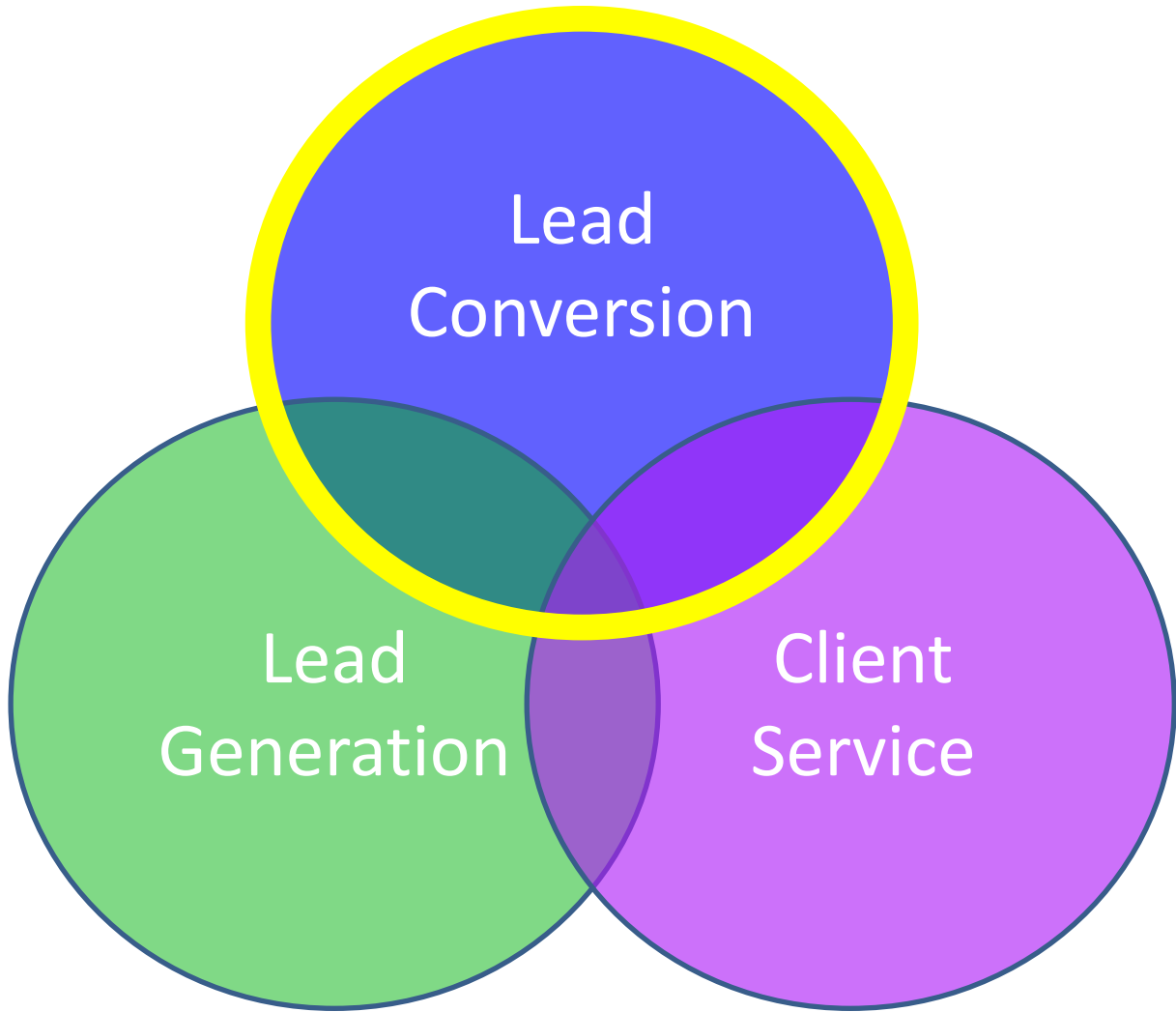
Client
Service



Lead
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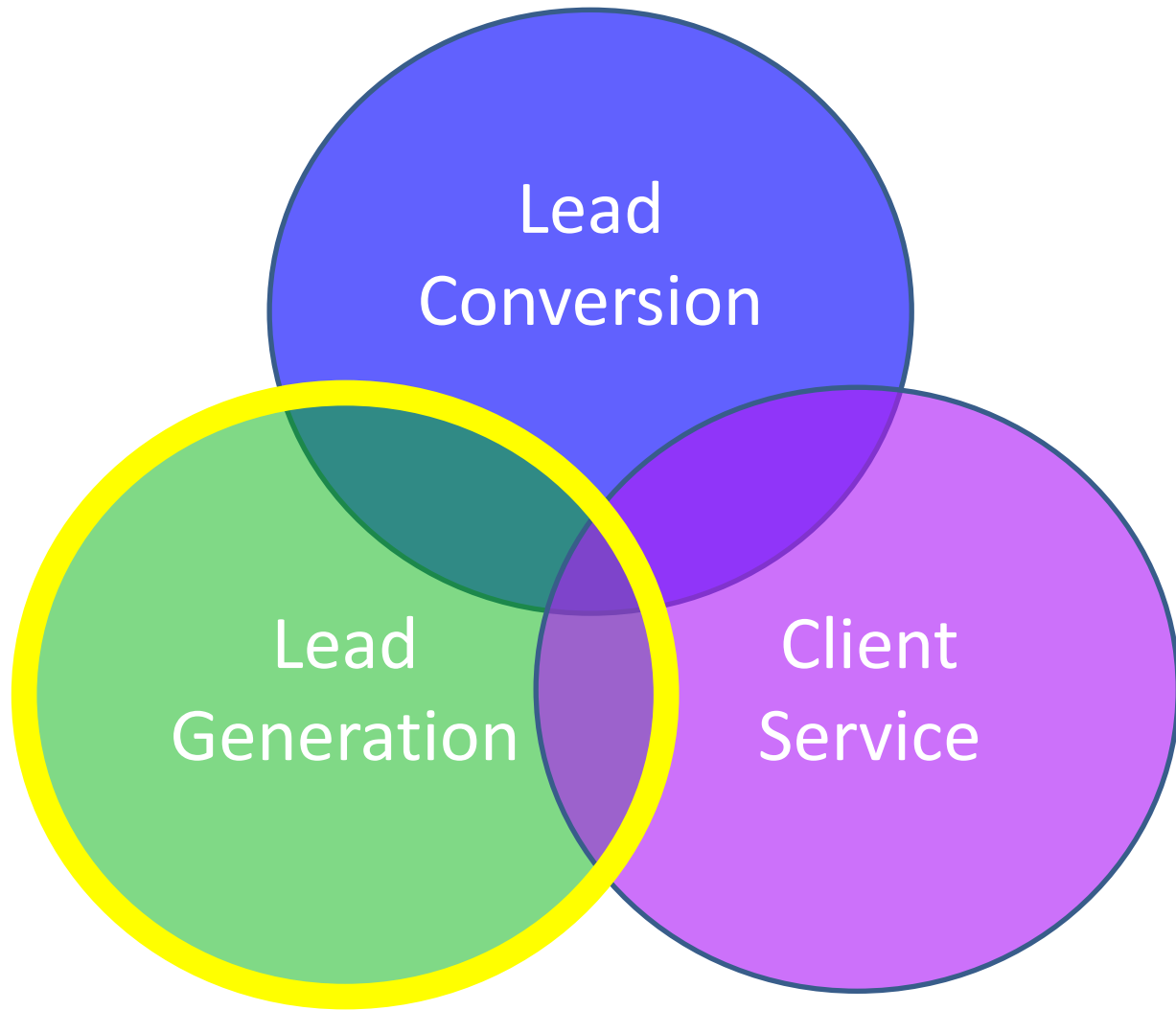
Client
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Client
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Mark,

How did you acquire 1,242 clients?

(How did you acquire that many clients, and become #1 producer at your firm, as an introvert with call reluctance?)

There are Many Ways to successfully acquire Ideal Clients

But, I refused to use any Sales Training Tactics

How **referable** are you?

✓ **Internal Referability: Goal?**

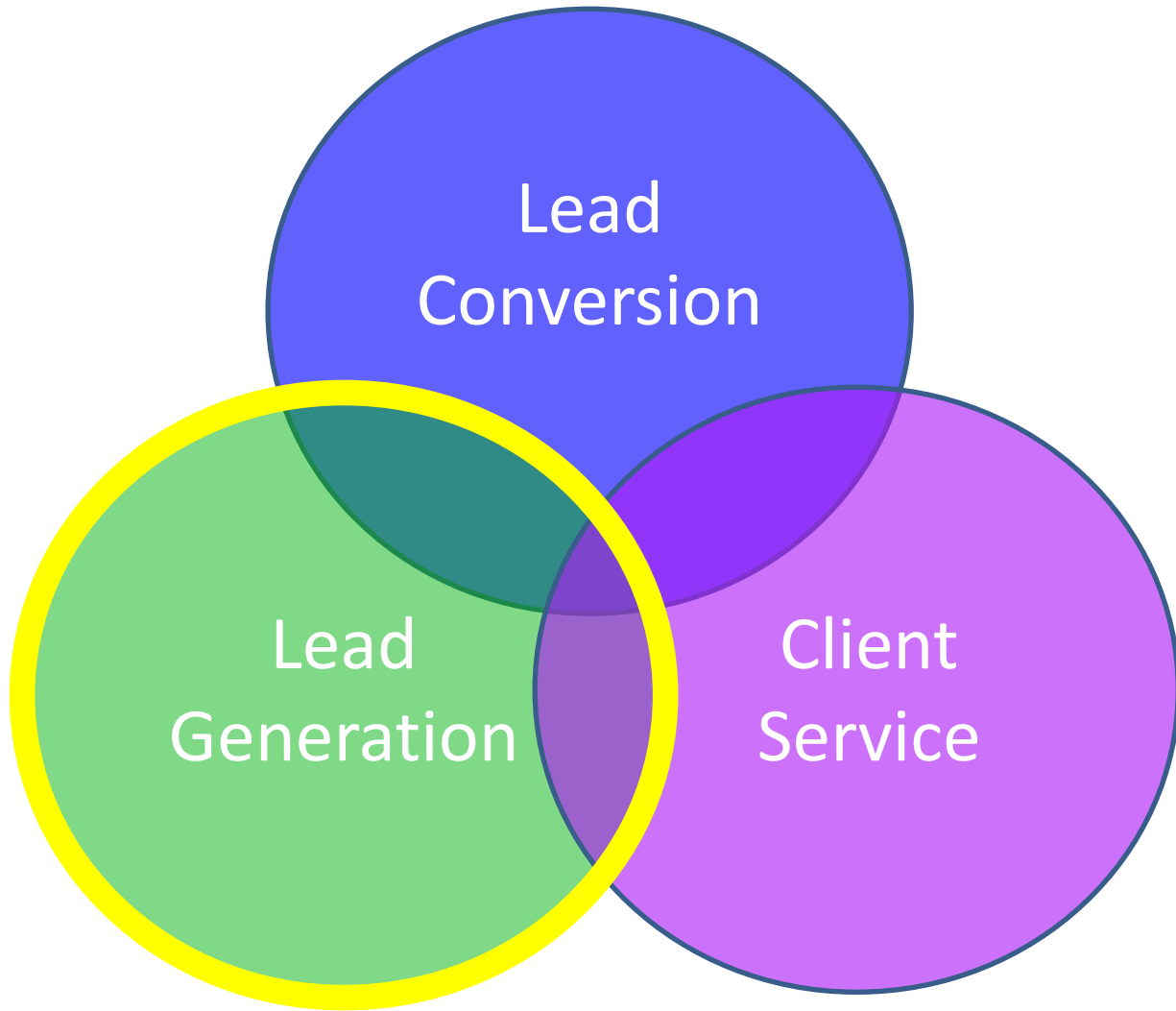
✓ **External Referability: Goal?**

Internal Referability

- ✓ **Goal: 6 Ideal Clients this year**
- ✓ **10 ICIs (FRMEs) = 1 IC**
- ✓ **6 x 10 = 60 FRMEs this year**
- ✓ **60 FRMEs ÷ 39 clients**
= 2 referrals per client this year
- ✓ **60 ÷ 50 weeks = 1.2 FRMEs per week**

**What if I'm
Worried I might NOT
receive at least 2
referrals per client
this year?**

(Because my average was LESS than that last year)



Lead
Conversion

Lead
Generation

Client
Service

Lead Generation **Tactics?**

- ✓ **Sales Training & Tactics**
- ✓ **Seminar Marketing**
- ✓ **Potential client dinners**

-or

- ✓ **Transform **personal relationships** into business relationships.**

**If you want my
Client Acquisition
method,
I'll share it if everyone
starts tracking**

(I'm watching to gauge how serious you are)

Let's Walk through your **[TRACKING] External Referability Spreadsheet**

(How should it look as you fill it in?)

Question

- ✓ Your tracking folder
 - ✓ THIS MONTH's FOCUS: PROJECTS: Prioritized Project Status Update
 - ✓ Your Weekly Project Status Update Report

Are you fully on track with these 4 projects?

- 1. Client Service Project:** Exceeding clients' expectation (MEASURE: 2 referrals per client per year MINIMUM)
- 2. Client Acquisition Project:** I'm on-track to my new revenue goals for the past 3-months! I've acquired at least 1 Ideal Client in each of the past 2 quarters.
- 3. Building & Leading My Team Project:** I have a skilled & effective SME in all 5 areas of finance (at least 3 SMEs)
- 4. Documenting Processes Project:** All processes are documented for client consistency.

Here's how I recommend you **get** on-track & **stay** on-track with **all** active projects

(Here's how I **guaranteed** weekly progress on all projects)

Let's Walk through your **PROJECTS: Prioritized Project Status Update Spreadsheet**

(Your **WEEKLY** Project Status Update Report)

Question

- ✓ I'd like to get some feedback on some best ways to develop new clients in a new territory
 - ✓ It's approximately 1-1/2 hours from where I currently live, but I plan on moving to in another 2-3 years.
 - ✓ Can this done via webinars or should it be done by in-person meetings. Any and all feedback would be appreciated.

In your situation

Here's what I would be doing

- ✓ **Make a list of “Literally Everyone I Know” tab**
- ✓ **Begin meeting with 10 people per week (20-30 min just to catch-up on personal relationship)**
- ✓ **Face-to-face is best, but zoom is OK if you must**
- ✓ **GOAL 13 new people per week: Get the people you know to introduce you to the people you don't know (I'm new to the area, who are your most interesting friends here in town?)**

Let's Walk through your “Literally Everyone I Know” tab

(Your **[TRACKING]** External Referability Spreadsheet)

In your situation

Here's what I would be doing

- ✓ **Make a list of “Literally Everyone I Know” tab**
- ✓ **Begin meeting with 10 people per week (20-30 min just to catch-up on personal relationship)**
- ✓ **Face-to-face is best, but zoom is OK if you must**
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In your situation

Here's what I would be doing

My results from that process:

- ✓ I literally only knew **10** people when I began in this business (just moved to a new town)
- ✓ Caught-up with **10** people per **week** (just to catch up personally)
- ✓ First Month: I was introduced to **50** new people (now I knew **60 potential referral sources**)
- ✓ Second Month: I was introduced to **50 MORE** new people (now I knew **110 potential referral sources**)
- ✓ ...**110 were ample** to acquire **17** Ideal Clients over time
- ✓ Those **17** ICs transformed to **100** ICs. That's **83 NEW** ICs in **34-months** after meeting Bill Bachrach (taught me The FRME)

I encourage you to
Invest 5-min every week to
update your tracking spreadsheet

You'll never regret it because it will
likely result in a breakthrough for your business.
(If you have questions, "Contact Us")

ADVISOR | **PACT**TM

The Only Game in Town

Protection

Attention

Coordination

Transparency