

ADVISOR | PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Advice Session

May 16, 2023

With Host Mark McKenna Little

Questions

- ✓ I'm having MUCH BETTER results acquiring clients since you began walking through your method of developing personal relationships rather than using sales techniques. I was doing seminars and it took me 4 months to ramp-up using your method, but I'm now generating more revenue than I was before. How should I be measuring my effectiveness with this method?
- ✓ I have been implementing The Advisor P.A.C.T. Monthly Program for 9 months and have built my team. Can I assess how well, or how closely I've implemented The Truly Comprehensive Financial Services™ model in this program?

Question

- ✓ I'm having MUCH BETTER results acquiring clients since you began walking through your method of developing personal relationships rather than using sales techniques. I was doing seminars and it took me 4 months to ramp-up using your method, but I'm now generating more revenue than I was before. How should I be measuring my effectiveness with this method?


Just joined The Advisor PACT 6 Month Program™ - What do I do next?
 How is Advisor PACT™ related to The Trained Advisor Toolkit™?
 The First 15 Modules: Titles and Descriptions
 What is the Advisor PACT™ (or Toolkit) "real track"?
 What is The Trained Advisor Toolkit™ (aka The Flagship Product)?
 What is the New Commitment for The AdvisorPACT™ Monthly Program™?
 Master Glossary


The First 15 Modules: Titles and Descriptions


Each month you'll receive the next module in the series for a period of 30 or 80 days. Some of these first 15 modules are paired together, making up the first 12 months worth of projects. Here's what you'll get in the first year.


The Monthly Project™





- 


The Essential Concepts Of Advisor PACT
 In this 9-part audio series, Mark, McKenna Little and Ian P. 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.
- 


Vision and Goals | For Financial Advisors
 Create a vision of your ideal future so compelling that you'll do whatever it takes to achieve your goals. Learn and develop disciplines to help you succeed in actualizing your vision.
- 


Annual Recurring Revenue Exercise
 Develop a specialized list of existing and potential clients that will guide you step-by-step through building your Ideal Client Community.
- 


Potential Client Interaction Time
 Learn why the most important number to track is the amount of time you spend interacting with potential clients, and begin tracking your PCI Time immediately.
- 


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


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.
- 


The Deliverables Team Recruitment Process
 Acquire your next Deliverables Team member in 12 simple steps.
- 


Evaluating Your Deliverables Team
 Learn the process for evaluating each of your direct reports every 4 months in an effort to improve your client experience.
- 


The Ten Client Deliverables, Course 1 of 2
 When you provide The Ten Client Deliverables to your clients, you are providing Truly Comprehensive Financial Services.
- 

The Ten Client Deliverables, Course 2 of 2
 When you provide The Ten Client Deliverables to your clients, you are providing Truly Comprehensive Financial Services.
- 

The First 104 Days of a New Client Relationship
 Learn how to get off on the right foot with every new Ideal Client relationship, and what you and your team should be doing during the first 104 days.
- 

Setting Your Compensation
 A new model for delivering financial services requires a new method of compensation. Learn how you'll get paid, and what you'll get paid to do under this new model.
- 

The Hero's Journey
 What do you have in common with Obi-Wan Kenobi? In this course, Mark walks you through how your path to becoming indispensable mirrors the classic Hero's Journey.
- 

The Extraordinary Client Experience
 While the entire Advisor PACT™ 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.
- 

The Annual Referral Rate and Referrality 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 Essential Concepts Of Advisor PACT
- Vision and Goals | For Financial Advisors
- Annual Recurring Revenue Exercise
- Potential Client Interaction Time
- The Role of the Administrative Manager
- Hiring an Extraordinary Administrative Manager
- The Deliverables Team Recruitment Process
- Evaluating Your Deliverables Team
- The Ten Client Deliverables, Course 1 of 2
- The Ten Client Deliverables, Course 2 of 2
- The First 104 Days of a New Client Relationship
- Setting Your Compensation
- The Hero's Journey
- The Extraordinary Client Experience
- The Annual Referral Rate and Referability Dashboard**
- ReferabilityDashboard.png
- The Referability Dashboard v2019.03.01 Screenshot
- Self-Assessment And Mastery

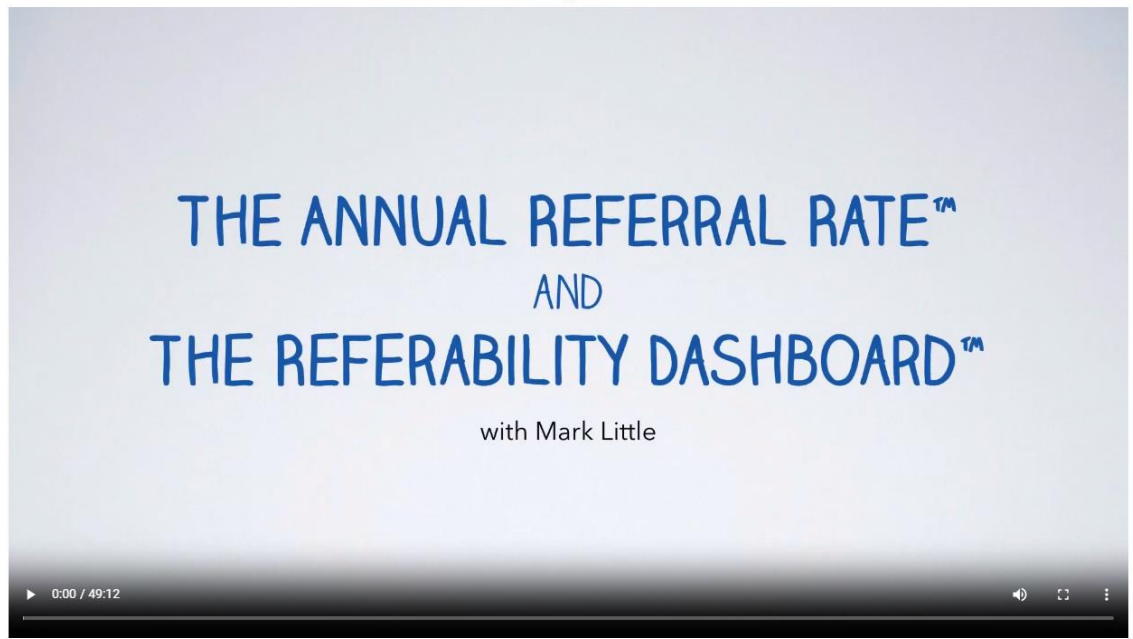
Manage portlets

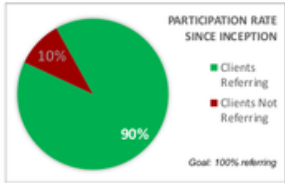
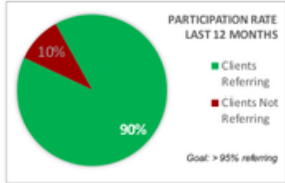
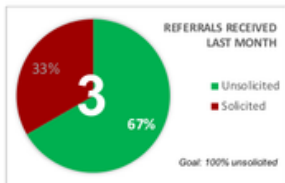
You are here: Home / The Monthly Project™ / The Annual Referral Rate and Referability Dashboard

Contents View Edit Sharing Actions Display Add new... State: Private

The Annual Referral Rate and Referability Dashboard

By exceeding client expectations, you can increase the quantity and quality of referrals you receive.





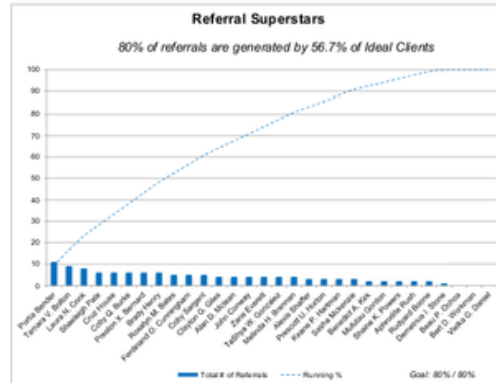
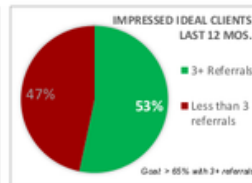
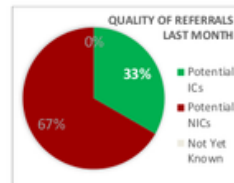
The Annual Referral Rate™ (TARR) February 2019

2.733

Goal: 15.000



Ideal Clients acquired last 90 days: 1
 Referrals (last 12 mos.): 82
 Average Referrals/Month (last 12 mos.): 6.833
 Referrals per Initial Client Interview™: 0.99
 Initial Client Interviews™ per Ideal Client: 4.0
 Referrals per Ideal Client: 4.000



Question

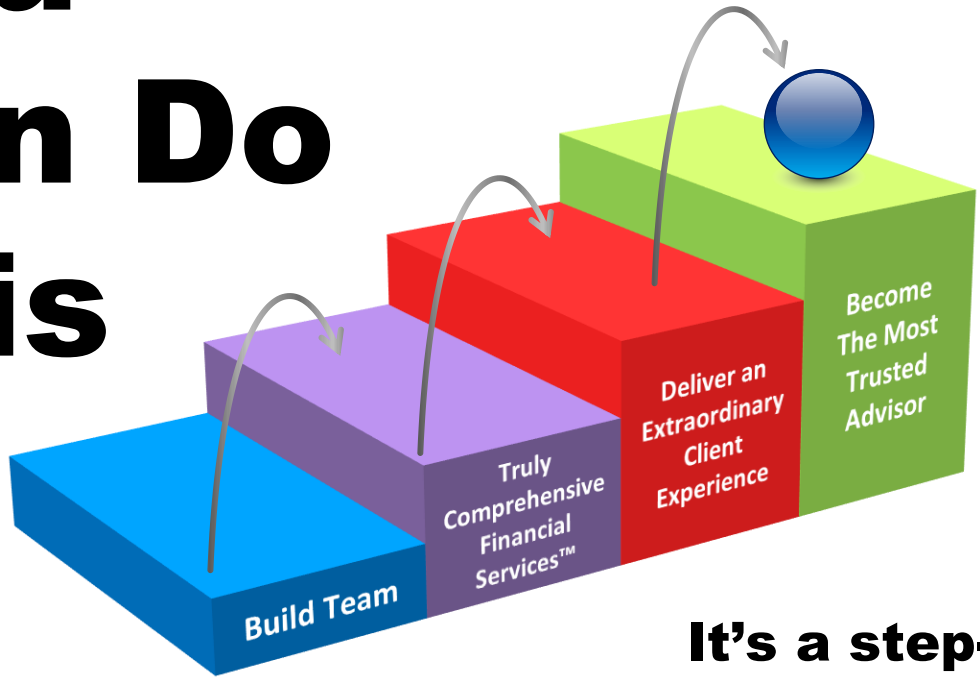
- ✓ I have been implementing The Advisor P.A.C.T. Monthly Program for 9 months and have built my team. Can I assess how well, or how closely I've implemented The Truly Comprehensive Financial Services™ model in this program?

Delivering on The Promise



PROTECTION ATTENTION COORDINATION TRANSPARENCY

**You
Can Do
This**

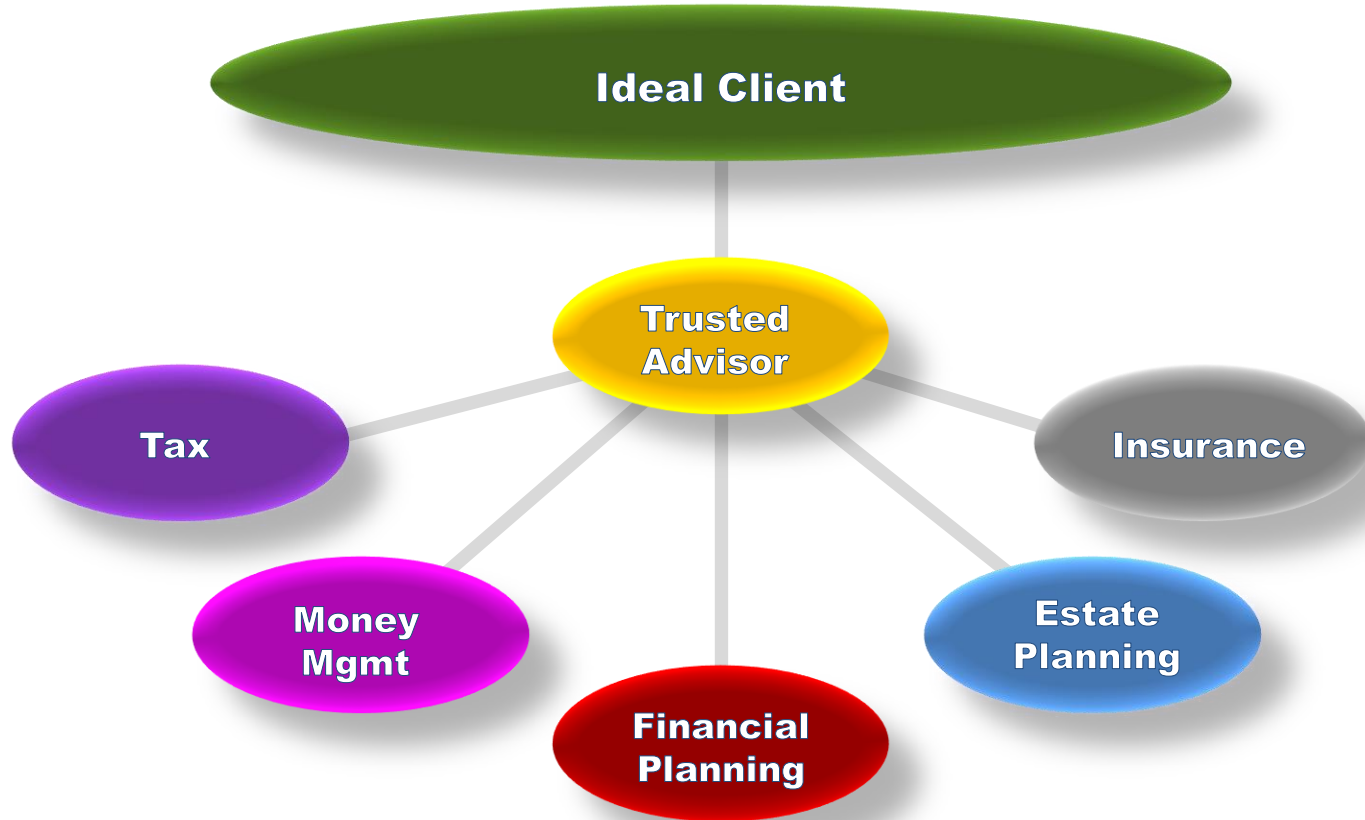


It's a step-by-step process



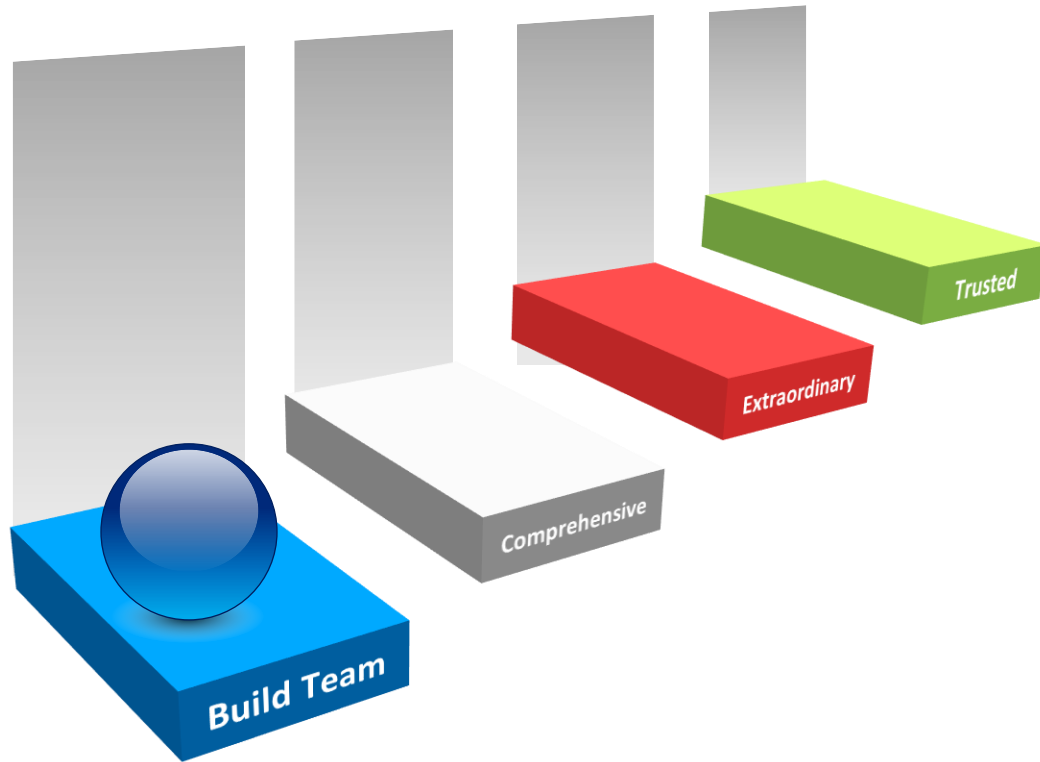


Our Business Model is different

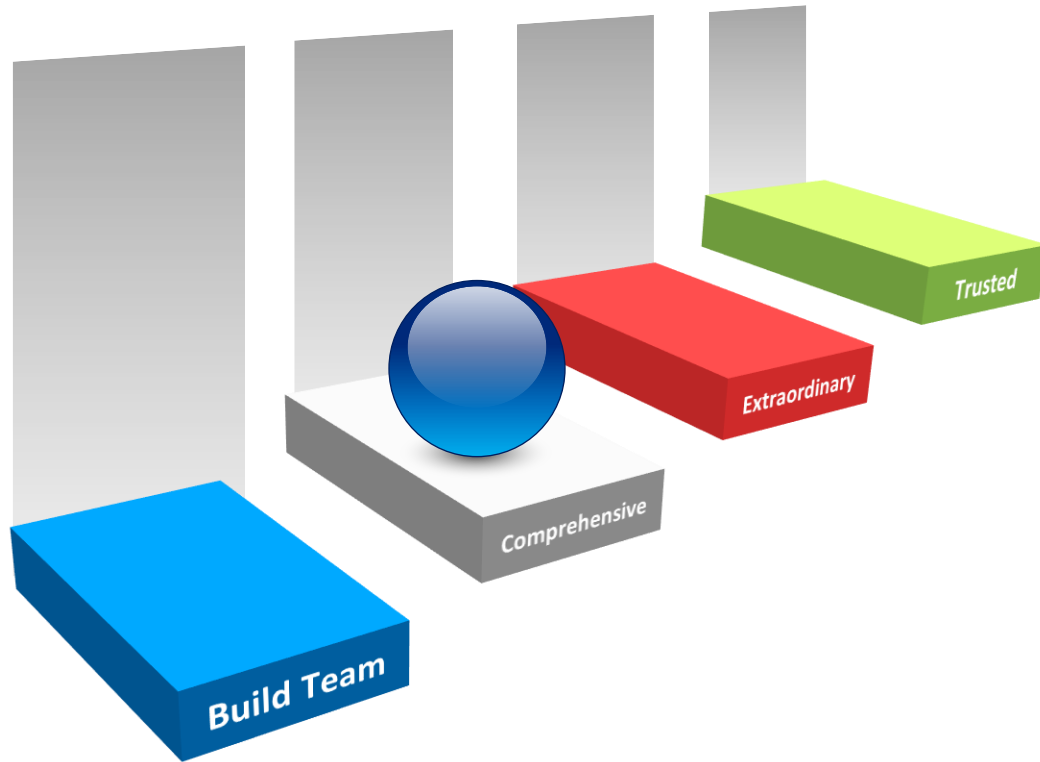




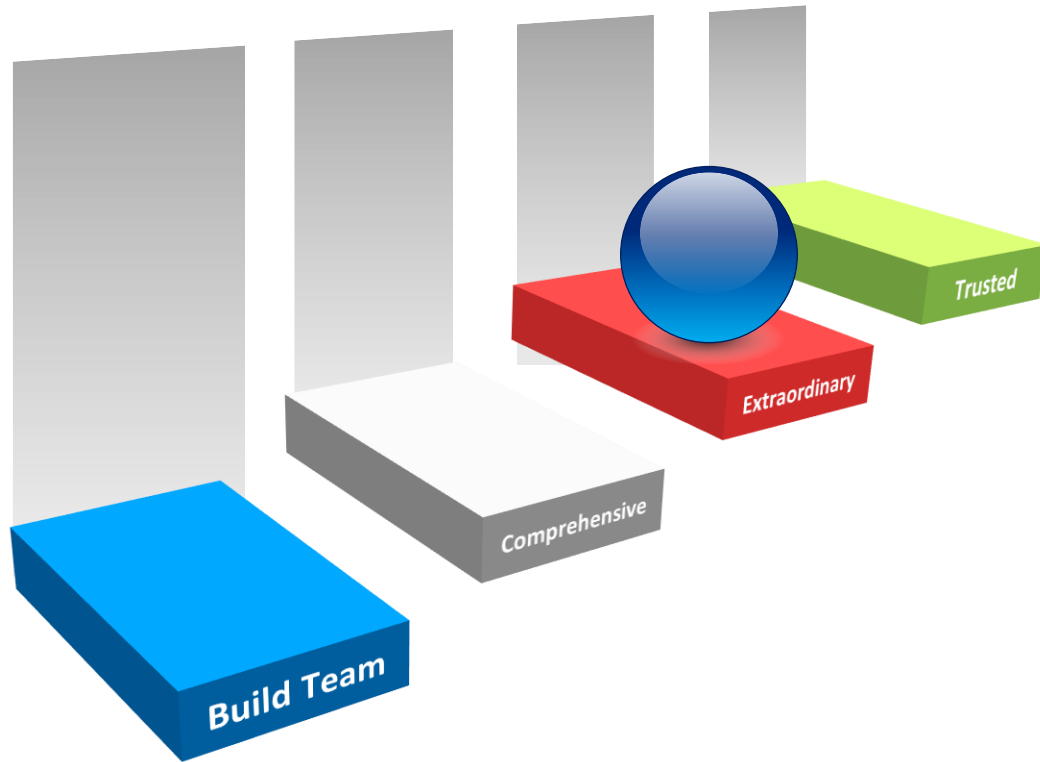
Delivering on The Promise



Delivering on The Promise



Delivering on The Promise





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 in order for you to experience those 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 GPS Action-Plan for every year of your life for which our team has a recommendation.

Target: 45 Days

The Initial Progress Update Meeting™ (IPU)
Follow-up on Actions Taken - Best Result:
 Measure progress since The Implementation Meeting on your actions taken

Target: 45 Days

The Comprehensive Safety Review™ (CSR)
Address Every Risk to Your Plan
 Best Result:
 • Recommendations from full insurance review
 • Review of Key Progress Reports
 • Review your GPS Action-Plan

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 Reserves
 • Review recommendations from the comprehensive written strategy for Debt
 • Review of Key Progress Reports
 • Review your GPS 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 & update of your Estate Plan
 • Review of Key Progress Reports
 • Review your GPS Action-Plan

Create a comprehensive written lifetime financial strategy (overarching plan)



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 in order for you to experience those 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 GPS Action-Plan for every year of your life for which our team has a recommendation.

Target: 45 Days

The Initial Progress Update Meeting™ (IPU)
Follow-up on Actions Taken - Best Result: Measure progress since The Implementation Meeting on your actions taken

Target: 45 Days

The Comprehensive Safety Review™ (CSR)
Address Every Risk to Your Plan
 Best Result:
 • Recommendations from full insurance review
 • Review of Key Progress Reports
 • Review your GPS Action-Plan

Target: 4 Months

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 & update of your Estate Plan
 • Review of Key Progress Reports
 • Review your GPS Action-Plan

Target: 4 Months

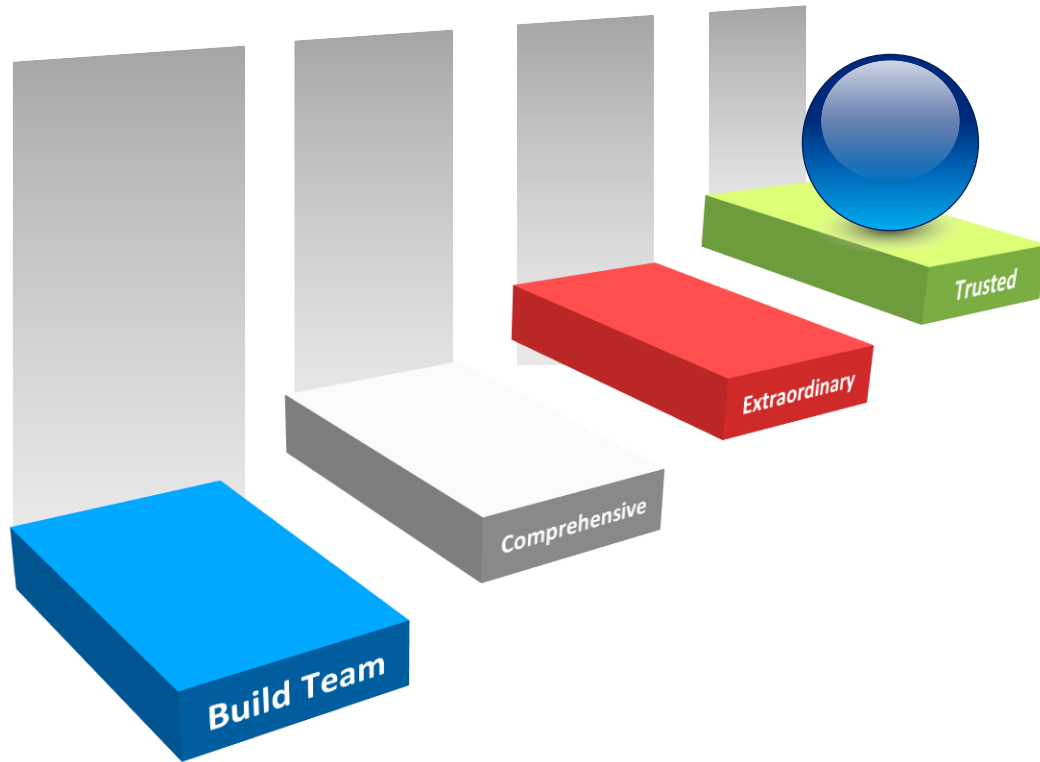
The Annual Review™
Update your comprehensive lifetime written financial plan
 Best Result:
 • Review recommendations from the comprehensive written strategy for Cash Reserves
 • Review recommendations from the comprehensive written strategy for Debt
 • Review of Key Progress Reports
 • Review your GPS Action-Plan

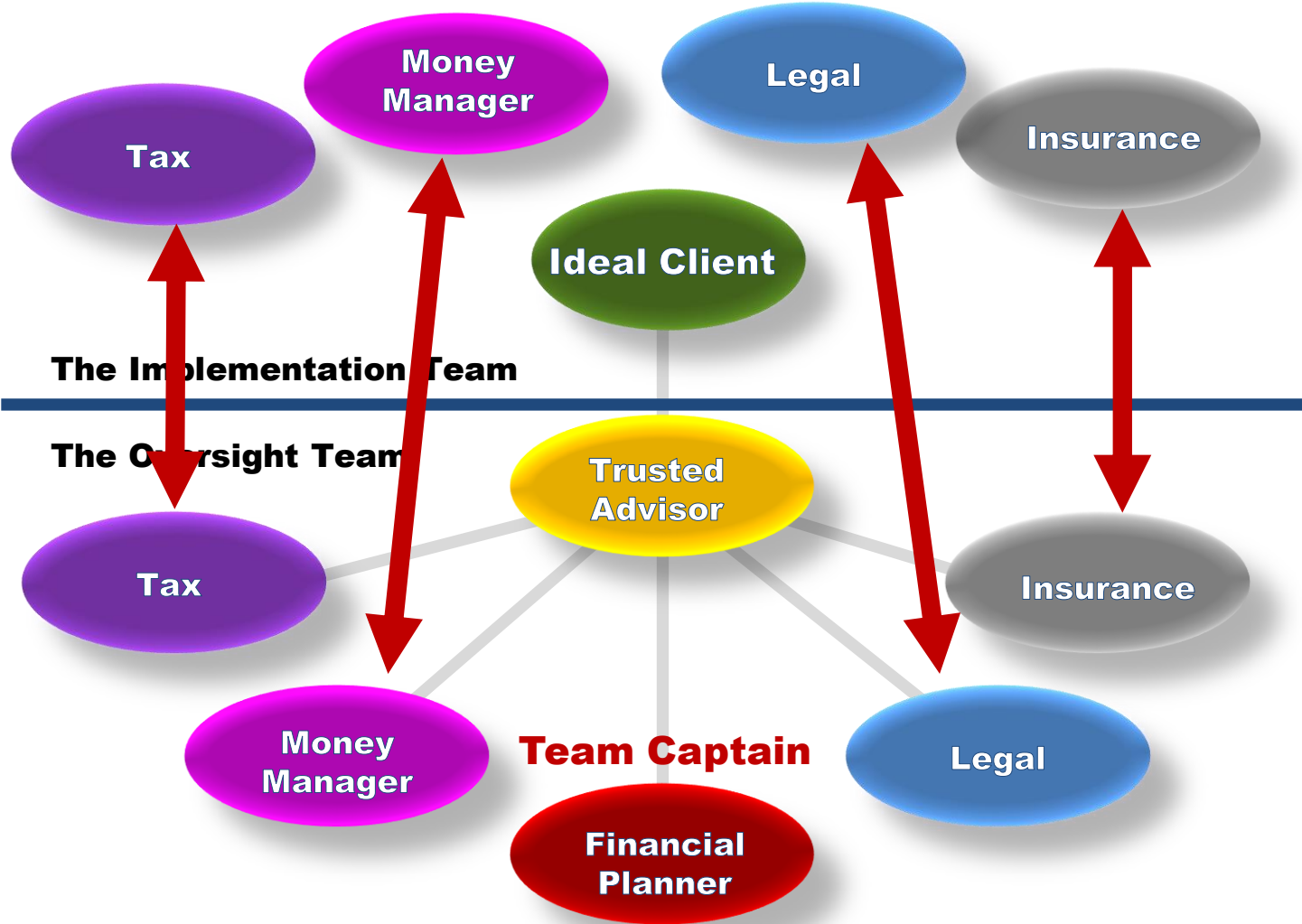
Meet 3X per year,
once every 4-months
...FOREVER

Deliver Truly
Comprehensive
Financial Services™

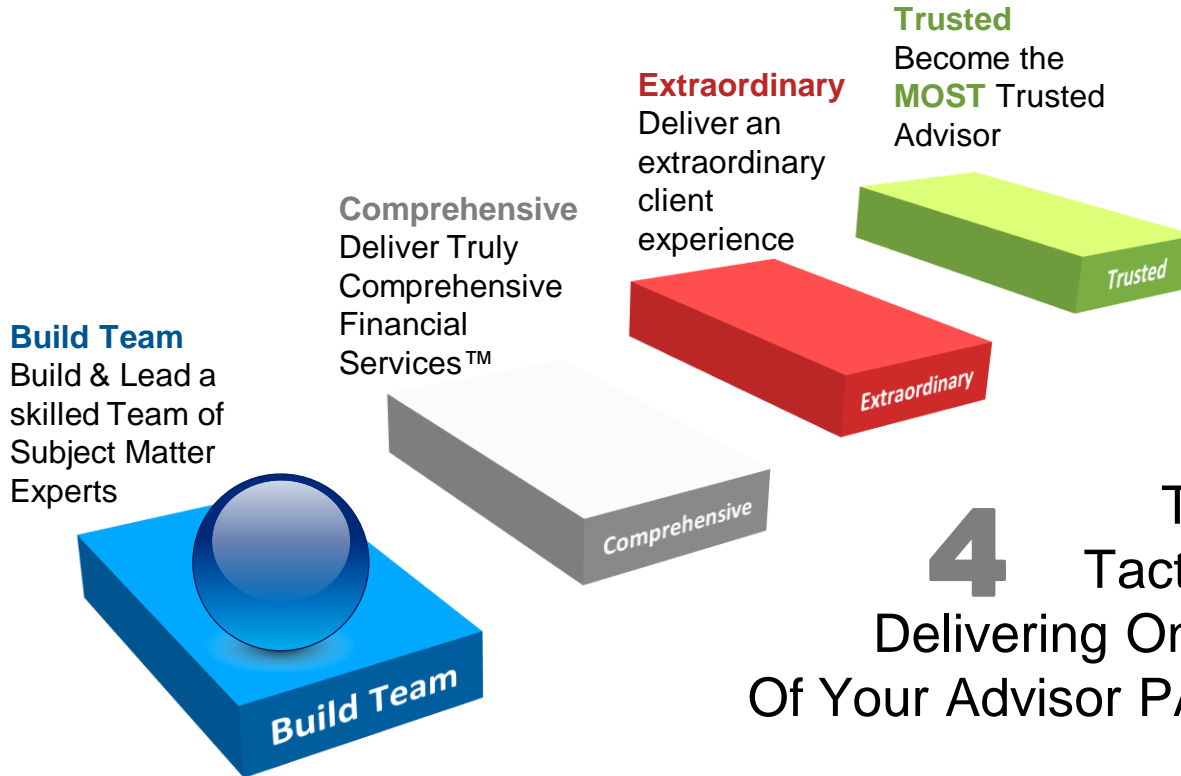
Ensure goals are
on-track & stay on-track

Delivering on The Promise



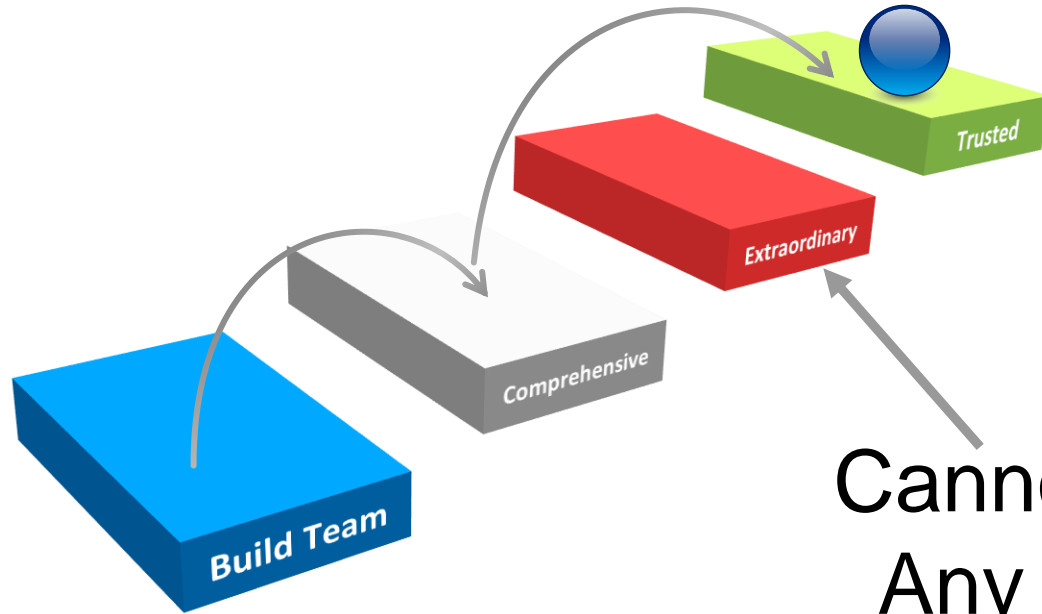


Delivering on The Promise



4 These Are The Tactical Steps For Delivering On The Promise Of Your Advisor PACT™ Pledge

Delivering on The Promise



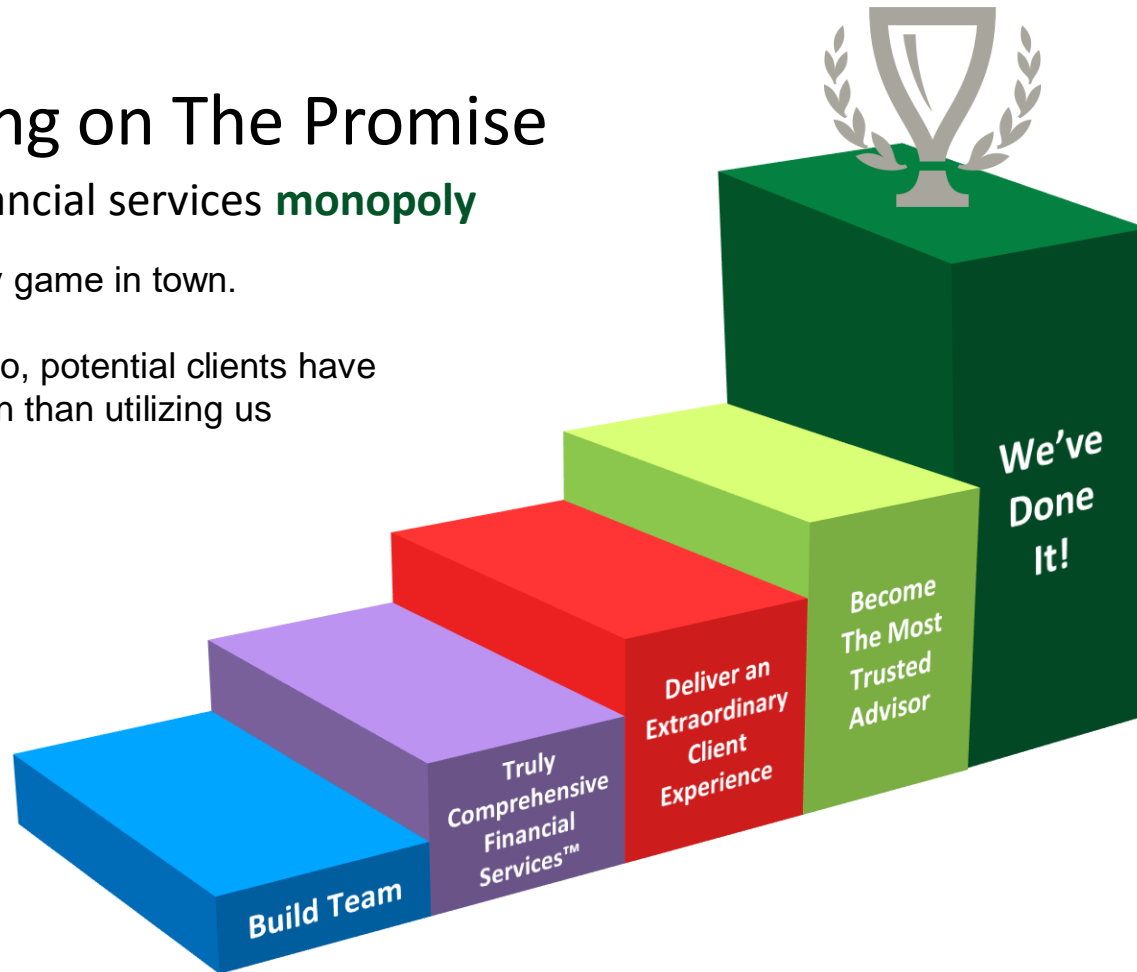
Cannot **Skip**
Any Steps

Delivering on The Promise

We're a financial services **monopoly**

We're the only game in town.

For what we do, potential clients have no other option than utilizing us

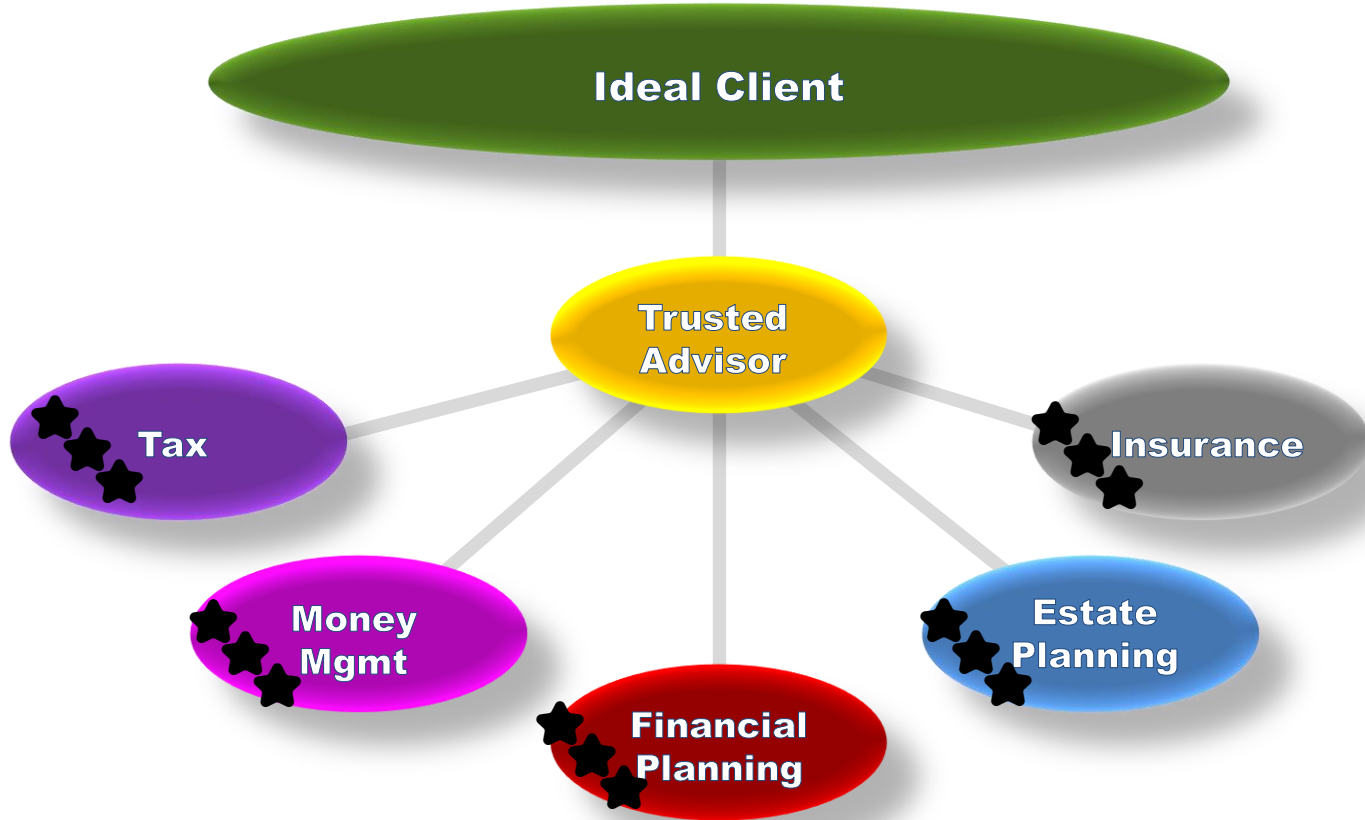


FAM CERTIFICATION (DRAFT):

Financial Advisor Mastery...

1. ★ Team of 3+ covering **ALL FIVE areas** of Personal Finance
2. ★ **The Ten Client Deliverables** covered by annual list of Deliverables
Checkpoints created by your Subject Matter Experts across all 5 areas
3. ★ **CWLFS** updated at least annually for every ideal client
4. ★ **45** impressive, above average, **action items** per ideal client over the past 12 months.

Our Business Model is different



FAM CERTIFICATION (DRAFT):

Financial Advisor Mastery...

1. ★ Team of 3+ covering **ALL FIVE** areas of Personal Finance
2. ★ **The Ten Client Deliverables** covered by annual list of Deliverables
Checkpoints created by your Subject Matter Experts across all 5 areas
3. ★ **CWLFS** updated at least annually for every ideal client
4. ★ **45** impressive, above average, **action items** per ideal client over the past 12 months.
5. ★ **The Three Meeting Process** in place – Next 12-mo meetings are currently scheduled (at all times)
6. ★ ★ ★ **TARR >3** & 1 Ideal Client acquired over the past 2 consecutive quarters

Abbrev	Term	Definition or explanation
CSRE	The Comprehensive Safety Review Exercise	The Ideal Client exercise conducted during The Comprehensive Safety Review™ (CSR)
CYA	The Correct Your Aim™ (CYA) client exercise	The Ideal Client exercise conducted during The Annual Review™ (TAR)
DCP	Deliverables Checkpoints™	Truly Comprehensive Financial Services™ = The Ten Client Deliverables™ = 142 Deliverables Checkpoints™
DRPM	The Dry-Run Prep Meeting™	The internal dress rehearsal 7-days prior to a client progress meeting with any Ideal Client
DSM	The Deal Structure Meeting™	The third of 3 meetings in the DTRP in this process of elimination (you'll conduct the DSM only with the final SME you've selected to join your team)
DTM	Deliverables Team Member	Any member of your team who is responsible for contributing in any way helping deliver on the promises that have been made to your clients (both Ideal Client and Non-ideal Client)
DTRP	The Deliverables Team Recruitment Process™	The 12-step process for filling one SME vacancy in less than 60-days
FAM	Financial Advisory Mastery Program	The one-on-one consulting program that we offer month-to-month
FAWT	Financial Weekly Tracking (FAWT)	Key Financial Advisor performance measures (KPMs) for the Client Acquisition Project. Weekly tracking of key metrics for Financial Advisor activity for new business growth
FCRs	Financial Critical Risks™	Financial Critical Risks™ are the most important risks for each of the personal financial goals (each report created with the software is available for your arms and legs)
FIRP	Financial Relationship Road Map™	"circles" all things move within: Our family, friends, colleagues, clients, hobbies, etc. are all examples of "circles" or people we might operate within
FRM (FRME)	Financial Road Map (FRME)	also known as The Financial Road Map Experience (FRME)
GMME	The Greatest Meeting Ever Devised™	The Greatest Meeting Ever Devised™ (GMME) a Client Acquisition course available through The Mark of Mastery™ https://themarkofmastery.com/
GPO	The Greatest Progress Opportunity™	also known as The Implementation Plan (TIP). The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action.
GPS (TIP)	The Greatest Probability Strategy™ (GPS)	also known as The Implementation Plan (TIP). The Greatest Probability Strategy™ (GPS) step-by-step implementation plan-of-action.
HPC	The Highest Priority Conversation™	The most important conversation that needs to be conducted with the Ideal Client at the next client progress meeting
IC	Ideal Client	An individual who meets ALL of the criteria listed in our Ideal Client Profile, not just a few criteria, but ALL of the criteria.
ICI (FRME)	The Initial Client Interview™	also known as The Financial Road Map Experience (FRME)
ICP	Ideal Client Profile	Every Trusted Advisor has an Ideal Client Profile detailing the profile of the client best served by the firm.
IDM	The Initial Discovery Meeting™	The first of 3 meetings in the DTRP in this process of elimination
KPMs	Key Performance Measures	Key metrics that measure success for our Deliverables Team Member. There are different KPM tracking sheets for AMs, SMEs & Trusted Advisors
LEIK	"Literally Everyone I Know"	A list maintained by every Financial Advisor with the names of Literally Everyone they Know. A long list of people (individual names) known by the Financial Advisor
M101	Marketing 101 Make a List Project	A Client Acquisition Project
MISC	The MISC Organizer™	Also known as The Relationship File™ (TRF). MISC is an acronym (Meaningful, Important, Significant, Compelling information about a person)
MOM	The Mark of Mastery™	https://themarkofmastery.com/ A free website for Financial Advisors introducing concepts developed by Mark McKenna Little for consistently exceeding Ideal Client
NIC	Non-ideal Client	A Non-ideal Client is someone who does NOT meet our Ideal Client Profile
NICP	Non-ideal Client Profile	If Non-ideal Clients are being accepted, then there also needs to be a Non-ideal Client Profile created (establishing the minimum standards)

Mastery link

You are here: [Home](#) / Welcome to Advisor PACT™ Monthly

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

ADVISOR | **PACT**TM

The Only Game in Town

Protection

Attention

Coordination

Transparency