The Advisor PACT Monthly Session™

October 20, 2015

Hosted by Mark Little

How much benefit do you want from today's session?

Are you ready to be here and no place else?

- Max Dixon

This online meeting system technology uses lots of memory & system resources, so please…

- ✓ Close your **email** program
- ✓ Close all **browsers**
- ✓ Close **all programs** on your computer other than this GoToWebinar system

Consider taking this attitude starting right now:

Something discussed today will be a significant positive game-changer for my business

I want to focus so I don't miss it

Question

How can I get my Subject Matter Experts to collaborate?

I have a team of Subject Matter Experts,

- ✓ **Financial Planning** Subject Matter Expert
- ✓ **Tax** Planning Subject Matter Expert
- ✓ **Money Management** Subject Matter Expert
- ✓ **Estate Planning** Subject Matter Expert
- ✓ **Insurance** Subject Matter Expert

But they **seldom** talk to each other. How can I get them to collaborate over client issues.

1. **Set the initial expectation**
   I **only** invite highly skilled Subject Matter Experts (SME) onto our team; the ways I measure skill are,
   - ✓ I expect every SME to have a robust process
   - ✓ I expect every SME to contribute (every meeting)
   - ✓ I expect **every** SME to **collaborate** (in between meetings)
   - ✓ I expect every SME to review the work of the others (prior to every client progress meeting)
2. **Begin publicly praising collaboration when you see it**
3. **Conduct an "Expectations Conversation" with each Subject Matter Expert every 4 months** (3x per year)

Begin by encouraging simple interactions between Subject Matter Experts

Explain that the way you measure "collaboration" is by the number of interactions among Subject Matter Experts in between client progress meetings

Interactions discussing, brainstorming, & consulting over issues related to our Ideal Clients.

Ask that Subject Matter Experts submit The Interaction Log™ to your Administrative Manager within 24 hours after every interaction

The Interaction Log™ (TIL)

- ✓ TIL is simply a standardized format for taking meeting notes
- ✓ Every person takes meeting notes in a different way, TIL corrects that by creating an “expected format” for notes
- ✓ TIL ensures that all the relevant information is included in the notes
- ✓ TIL eliminates that the natural human tendency to omit relevant information (information excluded because it’s thought to be “obvious”)
- ✓ A standardized format simply allows those reading the notes to
  - ✓ Quickly absorb the information (grow accustom to standard format)
  - ✓ Focus on most important information (such as action items & expected “next steps”)

The Interaction Log™

Insist that every Deliverables Team Member promptly submit a summary after every interaction related to any client so that the relevant team members are made aware.

What's Important About The Details of your Deliverables Team Member's Interactions Ideal Clients?

Your ability to provide comprehensive financial services, in many ways, will depend upon how well informed your highly-skilled Deliverables Team is regarding your Ideal Clients. In our business, information regarding clients is not static. Quite the opposite; information about your clients is dynamic and changes due to many factors. During the normal course of business your Deliverables Team Members will make recommendations based upon the best information they have. As Trusted Advisor, it is up to you to decide when, if and under what circumstances, your Deliverables Team Members may interact with your ideal clients.

While you may decide to be the single and only point of contact for clients by eliminating their contact with your Deliverables Team Members, most advisors decide just the opposite. Most advisors delegate to their Deliverables Team's and decide not to allow any "barriers to service" which could happen if contact is limited between Deliverables Team Members and the clients they serve. Whether it is clarifying information the client submitted on a fact-finder, following up on documents still needed from clients, or the Trusted Advisor asking a Deliverables Team Member to explain their recommendation directly to the client in a progress meeting, you may find your Deliverables Team Members interacting directly with clients.

Your Deliverables Team Member's interactions with your clients may be by phone, in-person, E-mail, or even traditional mail. The details of these communications may be critical for your other Deliverables Team Members to be fully updated, so as to best advise your clients, to be "fully updated," and for your team to demonstrate that you have a solid communication system in place.

The Value of a Standardized Interaction Log Format

A standardized format for The Interaction Log™ will:

- Simplify the process
- Ensure no important details are omitted
- Allow for Deliverables Team Members to quickly absorb the information

Without a standardized format, if you establish the expectation that all Deliverables Team Members promptly submit a log of all their client interactions, but fail to provide a format, then you will certainly receive varying results from each Deliverables Team Member. Some will provide short E-mails with certain pertinent details missing. Others may provide a lengthy, highly detailed, report which is difficult to absorb. If there are several E-mails back and forth between a Deliverables Team Member and a client, they may feel simply "cc'ing" you on all emails will suffice as an interaction log, when you may feel one interaction log summarizing the entire back-and-forth communication is optimal (which is your call).

Regardless, the establishment of a standard Interaction Log will make life simpler for everyone involved.

Rules of Agreement for Use of The Interaction Log™ (TIL)

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Rules of Agreement for Use of The Interaction Log™ (TIL)

Interaction Log Template (ILT)

MONTH, DAY, YEAR, TIME & VENUE OF INTERACTION (Phone, E-mail, etc):

INDIVIDUALS INTERACTING:

PURPOSE FOR INTERACTION:

BEST OUTCOME (hoped for in advance):

LAST STEP WAS:

HIGHLIGHTS OF INTERACTION:

ACTUAL OUTCOME (OUTCOME ACCOMPLISHED?):

NEXT STEP:

INDIVIDUALS THIS INTERACTION AFFECTS (OR MAY AFFECT):

call).

Regardless, the establishment of a standard Interaction Log will make life simpler for everyone involved.

Rules of Agreement for Use of The Interaction Log™ (TIL)

Require that The Interaction Log™ be submitted to your Administrative Manager **within 24-hours** after every interaction between Subject Matter Experts

Make those Interaction Logs™ available to your **other** Subject Matter Experts
so **they** can benefit from the insights, or "join the conversation"
(contribute additional helpful information or analysis)

Deliverables Team Member and a client, they may feel simply "cc'ing" you on all emails will suffice as an interaction log, when you may feel one interaction log summarizing the entire back-and-forth communication is optimal (which is your call).

Regardless, the establishment of a standard Interaction Log will make life simpler for everyone involved.

Rules of Agreement for Use of The Interaction Log™ (TIL)

INTERACTION LOG: Ozzie & Harriet Nelson - Message (HTML)

To... Administrative Manager

Cc...

Subject: INTERACTION LOG: Ozzie & Harriet Nelson

Interaction Log Template (ILT)

INDIVIDUALS INTERACTING:
Ozzie & Harriet Nelson W/ Trusted Advisor (by phone)

PURPOSE FOR INTERACTION:
Recommend Ozzie adjust his income tax withholdings at work.

BEST OUTCOME:
Ozzie agrees to sign the forms I emailed and go file them with his payroll department tomorrow morning

LAST STEP WAS:
Our Tax Subject Matter Expert just completed their income tax projection which identified not enough taxes have been withheld this year.

HIGHLIGHTS OF INTERACTION:

- **Spoke with Ozzie & Harriet for 20 min.**
- **Explained that unless Ozzie increased his income tax withholdings at work, they would need to write a big tax check next April.**

ACTUAL OUTCOME (OUTCOME ACCOMPLISHED?):

- **Harriet opened my E-mail, printed the tax form I sent.**
  - **I reviewed the form we filled out for Ozzie.**
  - **Gave instruction to Ozzie for filing it with his payroll department.**
- **Ozzie agreed to file the form tomorrow morning (Harriet promised to remind him).**

NEXT STEP:
Administrative Manager: Please call Ozzie at work tomorrow afternoon to confirm he was able to file the tax withholding form in his payroll department.

INDIVIDUALS THIS INTERACTION AFFECTS (OR MAY AFFECT):

- **Administrative Manager**
- **Tax Subject Matter Expert**

Rules of Agreement for Use of The Interaction Log™ (TIL)

Question

How do I create an extraordinary client experience?

I've heard you mention how important the client experience is, what can I be doing to enhance the experience my clients have at our meetings?

Gather your team and announce that your goal is to disengage from your existing business model.

That your decision to provide Truly Comprehensive Financial Services™ delivered through a team of skilled Subject Matter Experts will not be just a new set of
processes slapped on top of the existing business model.

Inspire your team by explaining you will need their help "ripping up the script," starting with a blank page & creating a completely new business model.

A "Blue Ocean Strategy"

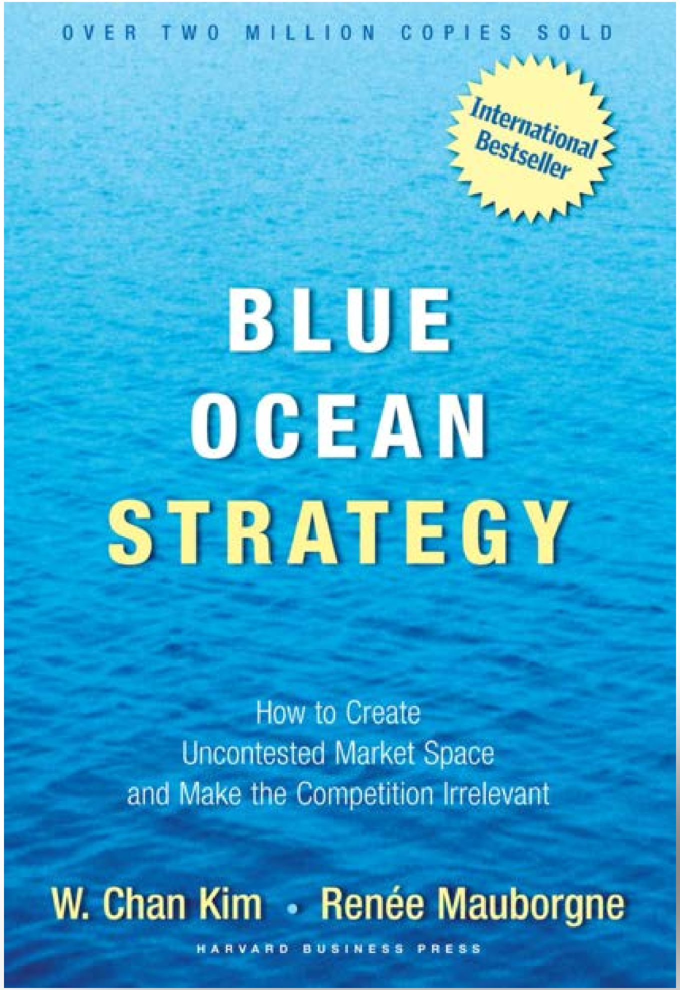
First we'll let existing clients tell us The Crucial Few™ things we do that are truly valuable (indispensable).

All other processes will be uprooted, completely reengineered, streamlined, or dropped completely.

We're getting rid of the culture of… "that's the way we've always done it here."

We're going to deliver on Advisor PACT™ by starting with a blank page (zero based thinking) and adding processes which deliver on that promise.

Think simple.


OVER TWO MILLION COPIES SOLD
International Bestseller
BLUE OCEAN STRATEGY
How to Create
Uncontested Market Space
and Make the Competition Irrelevant
W. Chan Kim • Renée Mauborgne
HARVARD BUSINESS PRESS

Blue Ocean Strategy

by W. Chan Kim and Renée Mauborgne

VS

RED OCEAN STRATEGY	BLUE OCEAN STRATEGY
Compete in existing market space	Create uncontested market space
Beat the competition (dog eat dog market)	Make the competition irrelevant (new business model)
Exploit existing demand (thinks: clients want “better investment management)	Create and capture new demand (thinks: clients want, can’t find, Advisor PACT™)
Make the value-cost trade-off (compete for business)	Break the value-cost trade-off (make cost irrelevant by changing the playing field)
Make strategic choice of differentiation ***or*** low cost of service (race to the bottom)	Pursue differentiation ***and*** low cost of service (you exist in a “blue ocean”)

So what's the "Blue Ocean" in our Business Model?
What's missing in our potential client's financial lives?

- ✓ Strategy to pull together tactics
- ✓ Overarching Strategy
- ✓ Oversight

New Business Model
Truly Comprehensive Financial Services™

Trusted Advisor

Committed to developing a "Blue Ocean Strategy"

Increasingly Competent

Build & lead a team of skilled Subject Matter Experts to deliver Truly Comprehensive Financial Services™

Worthy of trust

Deliver an extraordinary client experience

New Business Model
Truly Comprehensive Financial Services™

- ✓ Acquire a new Subject Matter Expert (SME) every 60 days
- ✓ Set The Ten Client Deliverables™ standard
- ✓ Every SME contributes
- ✓ Every SME reviews the work of the others

- ✓ Implement The Three Meeting Process™
- ✓ Create standard for “responsiveness”
- ✓ Set a weekly goal for documenting processes
- ✓ Orchestrate every step of “the client experience”

Increasingly Competent

Worthy of trust

New Business Model
Truly Comprehensive Financial Services™

Delivering a Truly Extraordinary Client Experience

Prior to becoming an Ideal Client

- ✓ The MISC Organizer™

The MISC Organizer

Date met: ______________________ FRM Date: ______________________

1. Name_________________Nickname___________________________
2. Company name ____
3. Address ____
Home address____
4. Business Phone: ______________________ Home: ________________
Cell ______________________ E-mail ______________________
5. Birth date: ____________ Birth Place ________________________
Hometown ____
6. Height (approx.) _______________ Weight (approx.) _______________

Life Focus

	Date	Date	Date	Date	Him	Her
Faith						
Fitness						
Family						
Friends						
Fun						
Field / Lifework						

Education

7. High school ____
Year graduated _________________
College ____
Year graduated _________________
8. College honors ____
Degrees ____
9. College fraternity/sorority / clubs ___________________________
Sports ____
10. College extracurricular activities ___________________________
____
11. Post Grad Degrees or Activities _____________________________
12. Military service ____
Discharge rank ____
Attitude toward being in the service ____________________________
____
____

The MISC Organizer

Family

13. Spouse's name and occupation ________________________________
14. Spouse's education ____
Fraternity / Sorority / Activities _______________________________
15. Spouse's interests ____
Occupation / Aspirations ____
16. Anniversary _______________ # of marriages _______________
17. Children, if any, names/ages (note if current marriage or past)
____
____
____

18. Children's education
____
____
____

19. Children's interests (hobbies, problems, etc.)
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____

Parents alive? (names & where) __________________________________
Parent caring a possibility? ____________________________________
____

Any relatives they're proud of? _________________________________
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The MISC Organizer

Business Background

20. Previous employment: (most recent first)

Company ______________________________
Location ______________________________
Title ____________________ Dates __________

Company ______________________________
Location ______________________________
Title ____________________ Dates __________

First Major Job:
Company ______________________________
Location ______________________________
Title ____________________ Dates __________

21. Previous positions at present company:
Title ____________________ Dates __________

22. Professionally most proud of ______________________________

23. How do they describe what they do?

24. Offices held or honors

25. How did he/she find out about us (through whom)?

The MISC Organizer

26. Who are the other Advisors?
Accountant (w/ phone): ______________________________
Attorney (w/ phone): ______________________________
Life and P&C Agent (w/ phone): ______________________________

27. Any bad experiences or problems with advisors in the past? Why?

28. What other people in our community know these folks?

29. Type of connection

Nature of relationship

30. What are his/her aspirations? What is his/her life all about?

New Business Model

Truly Comprehensive Financial Services™

Delivering a Truly Extraordinary Client Experience

Prior to becoming an Ideal Client

- ✓ The MISC Organizer™
- ✓ Extraordinary The Initial Client Interview™
- ✓ Consistent process for confirming appointments
- ✓ Preparing for potential client's arrival
- ✓ Office decorum (dress, cleanliness, atmosphere)

After becoming an Ideal Client

- ✓ Orchestrate the moment one becomes an Ideal Client
  - ✓ Signature moment should be memorable
  - ✓ Practice Advisor PACT™ pledge
- ✓ New Ideal Client Welcome Kit
- ✓ Deliver an extraordinary client progress meeting experience
  - ✓ The Progress Report™ (no market analysis)
  - ✓ The Highest Priority Conversation™
  - ✓ The Greatest Probability Strategy™ (GPS)

Client Progress Meeting 60 Minute Timeline

- ***Opening Routine (2 min)***

- ***Routine Portion of the meeting: The Progress Reports™ (10 min)***
  - ***Review Financial Road Map®***
  - ***The Numbers History™***
  - ***The Progress Reports™***

- ***The Focused Portion of the meeting (45 min)***
  - ***Meeting Exercise (15 min)***

    CSR: The Comprehensive Safety Review Exercise™

    GPO: The Goal Blueprint™

    TAR: The Correct Your Aim (CYA) Client Exercise
  - ***The Highest Priority Conversation™ (15 min)***

    Subject Matter Experts nominated The Highest Priority Conversation™ at The Dry-Run Prep Meeting™, and the Trusted Advisor has contemplated, and chosen, the topic in the days leading up to this client progress meeting. Ordinarily, The Highest Priority Conversation™ is used to:

    1. ***Accelerate this client's results, or***
    2. ***Remove obstacles that are slowing down progress***

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  - ***Review The Greatest Probability Strategy™ (GPS) step-by-step implementation plan of action (15 min)***

- ***Closing Routine (3 min)***

- ***Transition now to The Referral Conversation***

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