



# The Advisor PACT Monthly Session™

November 17, 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

ADVISOR  
**P**ACT

PROTECTION  
ATTENTION  
COORDINATION  
TRANSPARENCY



# Question

I am in need of an administrative assistant.

What do you recommend?

# We call this position Administrative **Manager** (AM)

You're seeking a manager, not an administrative **assistant**.

Your Administrative Manager will serve as “***Project Leader***”

- ✓ Helping you **build your team** of Subject Matter Experts
- ✓ Orchestrating assignments for **client progress meetings**
- ✓ **Coordinating** your Subject Matter Experts
- ✓ Holding your Deliverables Team **accountable** for fully delivering the mechanics of Truly Comprehensive Financial Services™

# We call the position Administrative Manager

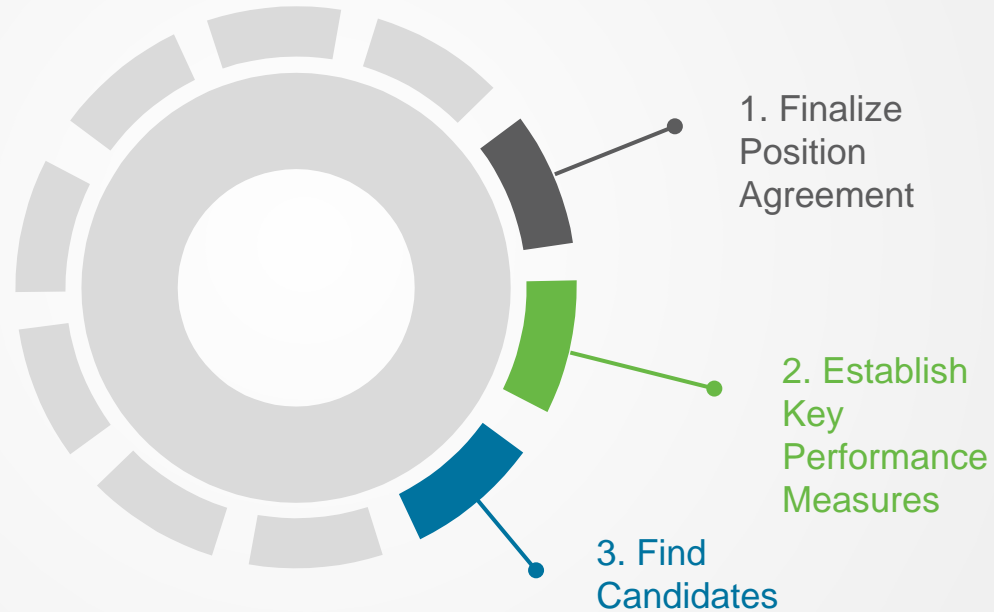
If your Administrative Manager is the Project Leader then  
**what's the project?**

The project is..

***“Creating an extraordinary client **experience** delivering Truly  
Comprehensive Financial Services™”***

There are 10 steps to  
hiring an effective  
Administrative Manager

# Hiring an Extraordinary Administrative Manager





# 1. Finalize the Position agreement

- ✓ Short version (1 pager)
- ✓ Long version

## 2. Establish Key Performance Measures

- ✓ Establishes **expectations**
- ✓ Measures **progress** towards mastery

## Administrative Manager Key Performance Measures (KPMs)

Proactiveness																								
-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10				
-10:					-5:					0:					+5:					+10:				
<ul style="list-style-type: none"><li>You <b>Never</b> "push" the process, so we <b>Always</b> have to "manage" you through any process. (unacceptable)</li><li><b>Never</b> raises significant issues before the TA or client does.</li><li><b>Never</b> "ahead" of relevant issues.</li></ul>					<ul style="list-style-type: none"><li>You <b>Seldom</b> "push" the process, so we <b>Often</b> feel we have to "manage" you through any process. (bad)</li><li><b>Seldom</b> raises significant issues before the TA or client does.</li><li><b>Usually Not</b> "ahead" of relevant issues.</li></ul>					<ul style="list-style-type: none"><li>You <b>sometimes</b> "push" the process effectively enough, but <b>sometimes</b> we have to "manage" you (not good).</li><li><b>Sometimes</b> raises significant issues before the TA or client does.</li><li><b>Usually</b> seems to be "ahead" of every relevant issue.</li></ul>					<ul style="list-style-type: none"><li>You <b>usually</b> "push" the process so effectively we <b>seldom</b> feel we're "pulling" you through any process.</li><li><b>Usually</b> raises significant issues before the TA or client does.</li><li><b>Usually</b> seems to be "ahead" of every relevant issue.</li></ul>					<ul style="list-style-type: none"><li>You <b>always</b> "push" the process so effectively we <b>never</b> feel we're "pulling" you through any process.</li><li><b>Always</b> raises significant issues before others have even contemplated them.</li><li><b>Always</b> seems to be "ahead" of every relevant issue.</li></ul>				

Knows our Ideal Clients Well																								
-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10				
-10:					-5:					0:					+5:					+10:				
<ul style="list-style-type: none"><li><b>Never</b> aware of client concerns, mindset, viewpoints and frame of reference.</li><li><b>Never</b> correctly grasps a client's motives &amp; motivations</li><li><b>Never</b> able to view issues from the client's perspective</li><li><b>Never</b> seeks to add to our MSC Organizer for any Ideal Client</li></ul>					<ul style="list-style-type: none"><li><b>Seldom</b> aware of client concerns, mindset, viewpoints and frame of reference.</li><li><b>Seldom</b> correctly grasps a client's motives &amp; motivations</li><li><b>Seldom</b> able to view issues from the client's perspective</li><li><b>Seldom</b> seeks to add to our MSC Organizer for any Ideal Client</li></ul>					<ul style="list-style-type: none"><li><b>Sometimes</b> aware of client concerns, mindset, viewpoints and frame of reference.</li><li><b>Occasionally</b> correctly grasps a client's motives &amp; motivations</li><li><b>Sometimes</b> able to view issues from the client's perspective</li><li><b>Sometimes</b> seeks to add to our MSC Organizer for any Ideal Client</li></ul>					<ul style="list-style-type: none"><li><b>Usually</b> aware of client concerns, mindset, viewpoints and frame of reference.</li><li><b>Almost always</b> correctly grasps a client's motives &amp; motivations</li><li><b>Usually</b> able to view issues from the client's perspective</li><li><b>Usually</b> seeking to add to our MSC Organizer for every Ideal Client</li></ul>					<ul style="list-style-type: none"><li><b>Always</b> aware of client concerns, mindset, viewpoints and frame of reference.</li><li><b>Always</b> correctly grasps a client's motives &amp; motivations</li><li><b>Always</b> able to view issues from the client's perspective</li><li><b>Always</b> seeking to add to our MSC Organizer for every Ideal Client</li></ul>				

Leadership																								
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-10:					-5:					0:					+5:					+10:				
<ul style="list-style-type: none"><li>Client Progress Meetings <b>never</b> well-prepared</li><li><b>Never</b> able to "coordinate" people</li></ul>					<ul style="list-style-type: none"><li>Client Progress Meetings <b>seldom</b> well-prepared, even when our Deliverables Team Members are cooperative.</li><li><b>Seldom</b> able to "coordinate" people even when they are willing</li></ul>					<ul style="list-style-type: none"><li>Client Progress Meetings <b>sometimes</b> well-prepared, even when our Deliverables Team Members aren't.</li><li><b>Sometimes</b> able to "coordinate" people who don't want to be "coordinated"</li></ul>					<ul style="list-style-type: none"><li>Client Progress Meetings <b>usually</b> well-prepared, even when our Deliverables Team Members are uncooperative.</li><li><b>Usually</b> able to "coordinate" people who don't want to be "coordinated"</li></ul>					<ul style="list-style-type: none"><li>Client Progress Meetings <b>always</b> well-prepared, even when our Deliverables Team Members are uncooperative.</li><li><b>Always</b> able to "coordinate" people who don't want to be "coordinated"</li></ul>				

## Administrative Manager Key Performance Measures (KPMs)

Collegial & Collaborative																								
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-10:					-5:					0:					+5:					+10:				
<ul style="list-style-type: none"><li><b>Always</b> blunt and unpleasant about it; always candid without being cordial. Not Likeable by others</li><li><b>Never</b> contacts other members of the Team when there are "crossover" issues between Deliverables Team Members.</li><li><b>Never</b> collegial with other Deliverables Team Members (or anyone)</li><li>Other Deliverables Team Members <b>never</b> enjoy working with you and <b>avoid</b> you.</li><li><b>Never</b> utilizes the Team's communication tools: The Solution Log™, The Exception Report™, Master Goal Tracking and "Escalating Obstacles"</li></ul>					<ul style="list-style-type: none"><li><b>Often</b> blunt and unpleasant about it; often candid without being cordial. Seldom Likeable by others</li><li><b>Seldom</b> contacts other members of the Team when there are "crossover" issues between Deliverables Team Members.</li><li><b>Seldom</b> collegial with other Deliverables Team Members and not able to diplomatically share the "kind truth" when others are wrong.</li><li>Other Deliverables Team Members <b>seldom</b> enjoy working with you.</li><li><b>Seldom</b> utilizes the Team's communication tools: The Solution Log™, The Exception Report™, Master Goal Tracking and "Escalating Obstacles"</li></ul>					<ul style="list-style-type: none"><li><b>Sometimes</b> blunt and unpleasant about it; sometimes candid without being cordial. Sometimes (but not always) Likeable by others</li><li><b>Sometimes</b> contacts other members of the Team when there are "crossover" issues between Deliverables Team Members.</li><li><b>Sometimes</b> collegial with other Deliverables Team Members and able to share the "kind truth" when others are wrong.</li><li>Other Deliverables Team Members <b>sometimes</b> enjoy working with you.</li><li><b>Sometimes</b> utilizes the Team's communication tools: The Solution Log™, The Exception Report™, Master Goal Tracking and "Escalating Obstacles"</li></ul>					<ul style="list-style-type: none"><li><b>Usually</b> blunt without being unpleasant; Often candid while, at the same time, cordial. Usually Likeable by others</li><li><b>Usually</b> contacts other members of the Team when there are "crossover" issues between Deliverables Team Members.</li><li><b>Ordinarily</b> collegial with other Deliverables Team Members and able to share the "kind truth" when others are wrong.</li><li>Other Deliverables Team Members <b>usually</b> enjoy working with you.</li><li><b>Usually</b> utilizes the Team's communication tools: The Solution Log™, The Exception Report™, Master Goal Tracking and "Escalating Obstacles"</li></ul>					<ul style="list-style-type: none"><li><b>Always</b> blunt but never unpleasant; Candid while, at the same time, cordial. Immensely Likeable by others</li><li><b>Always</b> contacts other members of the Team when there are "crossover" issues between Deliverables Team Members.</li><li><b>Always</b> collegial with other Deliverables Team Members and able to share the "kind truth" when others are wrong.</li><li>Other Deliverables Team Members <b>always</b> enjoy working with you.</li><li><b>Always</b> utilizes the Team's communication tools: The Solution Log™, The Exception Report™, Master Goal Tracking and "Escalating Obstacles"</li></ul>				

Skilled Administrator																								
-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8						
-10:					-5:					0:					+5:									
<ul style="list-style-type: none"><li>Client Prep-packets <b>never</b> organized and complete</li><li>Files <b>never</b> neat and organized</li><li>Ideal Clients <b>never</b> have CPDs scheduled in advance</li><li><b>Un-Skilled</b> using all software assigned</li></ul>					<ul style="list-style-type: none"><li>Client Prep-packets <b>seldom</b> organized and complete</li><li>Files <b>seldom</b> neat and organized</li><li>Ideal Clients <b>seldom</b> have CPDs scheduled in advance</li><li><b>Not Well-Skilled</b> using all software assigned</li></ul>					<ul style="list-style-type: none"><li>Client Prep-packets <b>sometimes</b> organized and complete</li><li>Files <b>sometimes</b> neat and organized</li><li>Ideal Clients <b>sometimes</b> have CPDs scheduled in 12 months ahead</li><li><b>Marginally Skilled</b> using all software assigned</li></ul>					<ul style="list-style-type: none"><li>Client Prep-packets <b>usually</b> organized and complete</li><li>Files <b>usually</b> neat and organized</li><li>Ideal Clients <b>usually</b> have Client Progress Meetings scheduled-out 12 months</li><li><b>Skilled</b> using all software assigned</li></ul>					<ul style="list-style-type: none"><li>Client Prep-packets <b>always</b> organized and complete</li><li>Files <b>always</b> neat and organized</li><li>Ideal Clients <b>always</b> have Client Progress Meetings scheduled-out 12 months</li><li><b>Highly Skilled</b> using all software assigned</li></ul>				

Every key performance area is measured with a score from -10 to +10 with "0" being neutral

## Subject Matter Expert Performance Measures

Deliverables Team Member Name \_\_\_\_\_ Completed by \_\_\_\_\_ Date \_\_\_\_\_

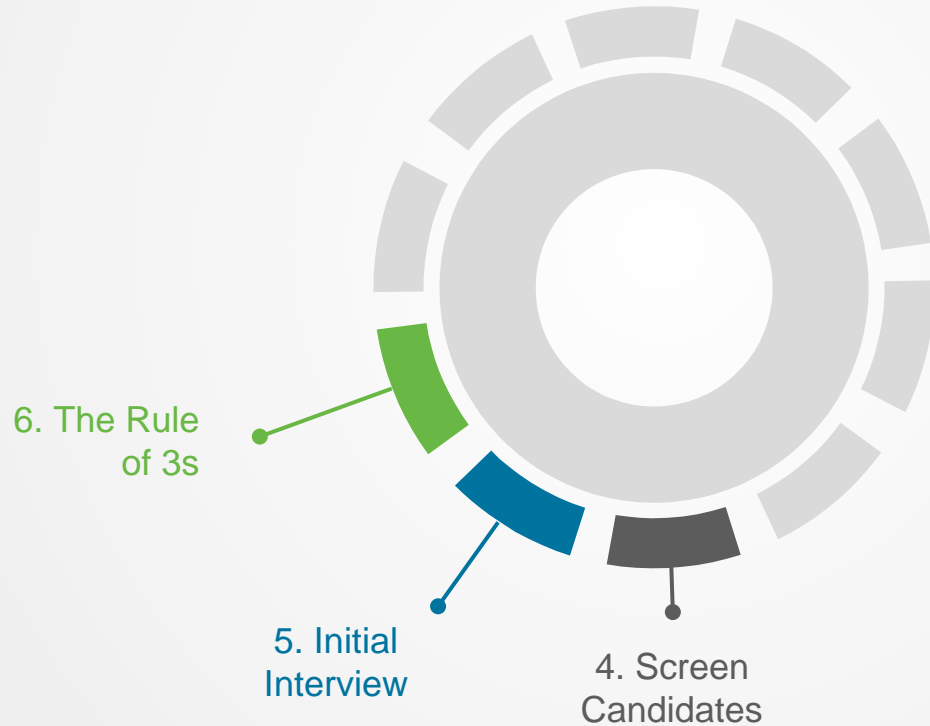
DRPM Preparedness																				
-10	-9	-8	-7	-6	-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5	+6	+7	+8	+9	+10
-10:																				
<ul style="list-style-type: none"> <li>You never display Full Mastery of details, documents, and information related to every Ideal Client at The Dry-Run Prep Meeting".</li> <li>Your preparedness is never apparent to those present.</li> <li>You never submit any action items or recommendations to AM prior to the DRPM deadline.</li> <li>Never submits an updated assessment for each DCP prior to the DRPM deadline.</li> <li>Never volunteers to show evidence (on screen) of all work they have done for a client.</li> <li>Never comes to meetings prepared</li> <li>Never contributes proactive strategies or recommendations for clients.</li> <li>Never resourceful or proactive when there are gaps in information or documents needed.</li> <li>Never has anything substantive to contribute</li> <li>Ordinarily seems lost or quiet or indecisive or simply repeats what others have already said</li> </ul>																				
-5:																				
<ul style="list-style-type: none"> <li>You seldom display Full Mastery of details, documents, and information related to every Ideal Client at The Dry-Run Prep Meeting".</li> <li>Your preparedness is seldom apparent to those present.</li> <li>You seldom submit any action items or recommendations to AM prior to the DRPM deadline.</li> <li>Seldom submits an updated assessment for each DCP prior to the DRPM deadline.</li> <li>Seldom volunteers to show evidence (on screen) of all work they have done for a client.</li> <li>Seldom comes to meetings fully prepared (action items completed, reports created, analysis thorough &amp; well-conceived)</li> <li>Seldom contributes proactive strategies and recommendations for clients.</li> <li>Seldom resourceful or proactive when there are gaps in information or documents needed.</li> <li>Sometimes has substantive comments to contribute</li> <li>At times seems lost or quiet or indecisive or simply repeats what others have already said</li> </ul>																				
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<ul style="list-style-type: none"> <li>You usually show Full Mastery of details, documents, and information related to every Ideal Client at The Dry-Run Prep Meeting".</li> <li>Your preparedness is usually obvious to everyone present.</li> <li>You usually submit your action items and recommendations to AM prior to the DRPM deadline.</li> <li>Usually submits an updated assessment for each DCP prior to the DRPM deadline.</li> <li>Usually volunteers to show evidence (on screen) of all work they have done for a client.</li> <li>Usually comes to meetings fully prepared (action items completed, reports created, analysis thorough &amp; well-conceived)</li> <li>Usually contributes proactive strategies and recommendations for clients.</li> <li>Usually resourceful and proactive in spite of gaps in information or documents needed.</li> <li>Seldom unclear about the "client issue at-hand"</li> <li>Usually has substantive comments to contribute</li> </ul>																				
+10:																				
<ul style="list-style-type: none"> <li>You always show Full Mastery of details, documents, and information related to every Ideal Client at The Dry-Run Prep Meeting".</li> <li>Your preparedness is always obvious to everyone present.</li> <li>You always submit your action items and recommendations to AM prior to the DRPM deadline.</li> <li>Always submits an updated assessment for each DCP prior to the DRPM deadline.</li> <li>Always volunteers to show evidence (on screen) of all work they have done for a client.</li> <li>Always comes to meetings fully prepared (action items completed, reports created, analysis thorough &amp; well-conceived)</li> <li>Always contributes proactive strategies and recommendations for clients.</li> <li>Always resourceful and proactive in spite of gaps in information or documents needed.</li> <li>Never unclear about the "client issue at-hand"</li> <li>Always has substantive comments to contribute</li> </ul>																				

### 3. Find Candidates

Each member of your team

- ✓ 500 emails to family, friends, colleagues, past associates, vendors
- ✓ Reach out to your LinkedIn contacts too
  - ✓ Job boards & advertise position

# Hiring an Extraordinary Administrative Manager



## 4. Screen Candidates

- ✓ Give candidates an assignment before you offer an interview
- ✓ If results of the assignment aren't up to your standards, then politely disengage from the candidate  
(quickly... & move on to the next candidate)

## Administrative Manager Position

Thank you for your interest in the Administrative Manager position we are currently seeking to fill. Please invest a few minutes with the following exercise and, once completed, email it to us along with your resume to [your email address]. If you meet the profile we're seeking we'll contact you to schedule an interview.

1. Correct the grammar in the following sentences, or simply make a "check mark" if the sentence is correct:

- ✓ I have visited Niagara Falls last weekend.
- ✓ She's married with a dentist.
- ✓ I look forward to meet you.
- ✓ I've been here since three months.
- ✓ You speak English good.
- ✓ Do you like a glass of wine?
- ✓ I promise I call you next week.
- ✓ It is raining when I got home last night.
- ✓ My sister is annoying today, but usually she is nice.
- ✓ If I were a child, I would play outside.
- ✓ If we will be late, they will be angry.
- ✓ My father is thinking that I should stop smoking.
- ✓ I fell asleep while I watched TV.

2. Please perform the following calculations

- ✓  $12 + 23 + 87 + 44 + 95 + 78 + 85 + 11 \times 12 + 15 + 66 + 90 = ?$
- ✓ 12 is what percentage of 750 =?
- ✓ 22% of 497 =?
- ✓  $87 + 66 + 62 + 27 + 93 + 39 + 52 + 16 + 80 \times 13 + 73 + 12 = ?$

## Administrative Manager Position

3. "Here is a prioritized list of skills we're seeking, please write a paper (as short or long as you wish) describing what you've done in the past exhibiting each of these skills below.

- ✓ Leadership skills
- ✓ Attention to detail
- ✓ Ability to prioritize
- ✓ Proactive
- ✓ Self-disciplined
- ✓ Reliable

Describe some things you've done in your past which showcases each of these individual skills. At this point in the process I'm less interested in what you think you can do for our organization and I'm *more* interested in hearing you describe many instances of how these skills have "shown up" in your past. Impress us with many stories from your past where each of these skills were critical to success."



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Basic Grammar

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Simple math & attention to detail

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Request a writing sample from the candidate

Assess how well they follow the instruction (answer the question)

# 5. Initial Interview

## Goals of the first interview

- ✓ Confirm **skills**
- ✓ Confirm the candidate is a **collegial** “team player”  
(good personality fit)
- ✓ Decide whether this candidate has the **leadership** skills required to get things done through others  
& keep the project moving **forward**

## Interviewing for a Project Leader (Administrative Manager)

I always focus upon these questions (I mainly focus upon what they've done in the past):

1. Do you understand the job (describe your understanding of the job to me)?
2. What have you done in the past which leads you to believe you're the right person for this job?

3. Describe some things you've done where your leadership skills were required (impress me with many stories from your past)?

4. Describe some things you've done where "Attention To Detail" was required (impress me with many stories from your past)?

5. Describe some things you've done where you had to be proactive (impress me with many stories from your past)?

6. Describe some things you've done where you had to be extremely resourceful (impress me with many stories from your past)?

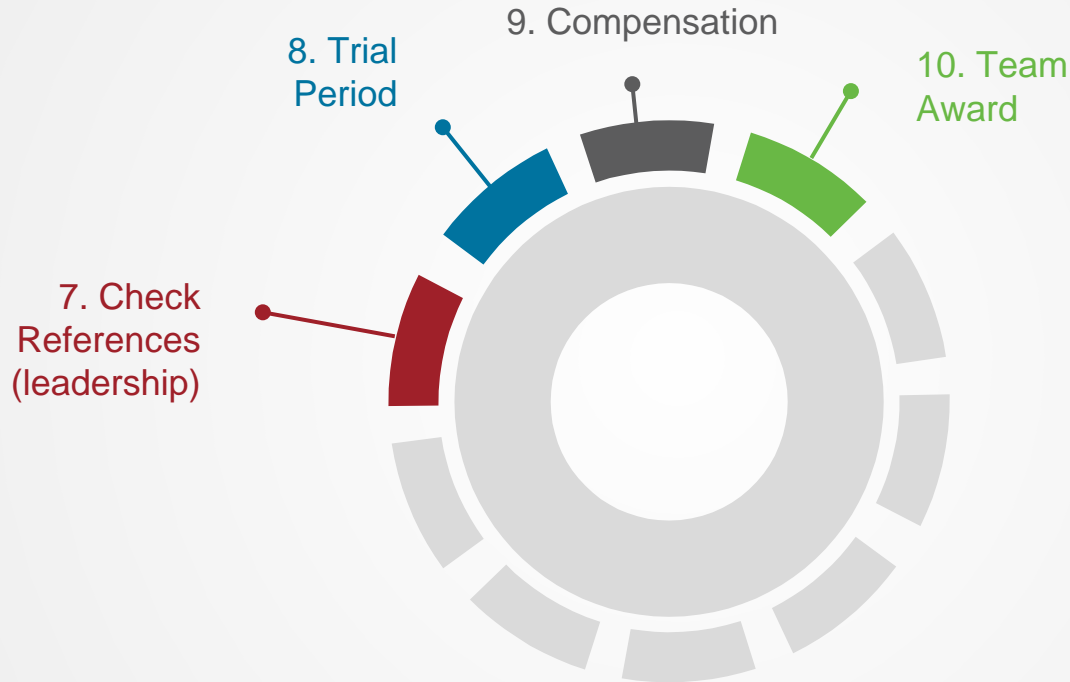
I don't so much want to hear what they plan to do in the future on the job. Rather I want to hear what they've actually done in the past which showcases the skills we're seeking.

"Tell me what you've done"

## 6. The Rule of 3s

- ✓ Three interview process
- ✓ Three individuals conducting interviews

# Hiring an Extraordinary Administrative Manager



# 7. Check References

- ✓ Ask for examples of leadership
- ✓ Ask for peers, co-workers, volunteer associates
- ✓ Check at least 3 references  
(The Rule of 3s)



## 8. Trial Period

- ✓ 4-month **trial** period (try before you buy)
- ✓ Allows 4 months for Administrative Manager to demonstrate **mastery**
- ✓ Must **complete** your training program **and** be performing at your standards by the end of 4 months
- ✓ Job becomes permanent after 4 months
- ✓ (AM responsible for making sure the “AM Expectations” conversation (review) is on your calendar at least once **every** 4 months)

# 9. Compensation

## 10. Team Award

- ✓ Compensation is usually **salary**, but can be hourly wage
- ✓ Does **not** have to be full time at the beginning
- ✓ **Virtual** Administrative Manager (VAM)
  - ✓ VAM is **better** than none
  - ✓ Work towards **full-time, in-office** position
- ✓ Establish **how many** Ideal Clients you will require in order to be able to budget for a full-time, in-office Administrative Manager serving as your team's Project Leader.

## Administrative Manager Compensation Model

**55%: SME Base Comp**

**30%: Merit Bonus**

**15%: Team Award**

# Base Comp Criteria (55%)

- ✓ **Proactive regular status-update check-ins**

Demonstrates ability to continually make “forward progress” implementing the 11-steps of Truly Comprehensive Financial Services™.

- ✓ **Effective Project Leader**

Quality & quantity of Subject Matter Expert work is high. The Client Prep Packets™ completed prior to deadlines Subject Matter Experts regularly collaborate (submit The Interaction Logs™)

- ✓ **Extraordinary Dry-Run Prep Meetings™**

Dry-Run Prep Meetings™ are useful to the Trusted Advisor in preparing for client progress meetings

# Merit Bonus Criteria (30%)

- ✓ Work submitted  
Prior to the deadline, and  
Prior to “date promised”
- ✓ Insists that SMEs collaborate  
(The Interaction Logs™ quality & quantity  
are improving at all times)
- ✓ Key Performance Measures:  
Bonus tied to increases in scores

# Team Award Criteria (15%)

- ✓ Increased Referrals/ Referral Rate
- ✓ Retention Rate
- ✓ The Advisor Value Score™ (AVS)

AVS **Increase** (movement since last bonus)

AVS **above +81**

**Promoters** (score 9-10)

loyal enthusiasts who are fueling your growth.

**Passives** (score 7-8)

satisfied but unenthusiastic

Clients who are vulnerable to competitive offerings.

**Detractors** (score 0-6)

unhappy clients who can damage you and  
impede growth through negative word-of-mouth.

Indispensability percentage **above 95%**

## Administrative Manager Compensation Model

**55%: SME Base Comp**

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# Hiring an Extraordinary Administrative Manager

