The Advisor PACT Monthly Session™

February 16, 2016

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
PACT
PROTECTION
ATTENTION
COORDINATION
TRANSPARENCY

Question

I’m expecting alot from my Administrative Manager and my Subject Matter Expert.

How do you recommend I measure their performance?

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Conduct
The Expectations Conversation

With your AM & each SME
At least once every 4 months
(3 times per year)

Record every meeting

Schedule time to prepare prior to every “Expectations Conversation”

Come prepared with your file on the person:
Everything they’ve done extraordinarily well since the last meeting
Anything that has not gone well since the last meeting

TA: Complete The Key Performance Measures in advance
AM or SME: Complete The Key Performance Measures in advance

Open every “Expectations Conversation” with a confirmation of the Implementation Objective

“Deliver an Extraordinary Experience to every Ideal Client”

The Project is to deliver Truly Comprehensive Financial Services™ to each Ideal Client through a skilled Deliverables Team of Subject Matter Experts in such a way that we are indispensable from our client’s perspective

Your KPM Scores in each area will be different

The majority of the time will be invested discussing

- ✓ Why their score is different from yours
- ✓ Their plan to advance their score in each individual area over the next 4 months
- ✓ Discussion of how they feel the team, and they themselves, will increase value to Ideal Clients over the next 4 months

The
Key Performance Measures Format

+10 being best performance
0 being neutral performance (usually unacceptable)
-10 being worst performance

DRPM Scheduling & Promptness

-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
• DRPMs **Never** start on time, with everyone present • DRPMs are **Never** at least 7 days before every CPM	• DRPMs **Seldom** start on time, with everyone present • DRPMs are **Seldom** at least 7 days before every CPM	• DRPMs **Sometimes** start on time, with everyone present • DRPMs are **Sometimes** at least 7 days before every CPM	• DRPMs **Usually** start on time, with everyone present • DRPMs are **Usually** at least 7 days before every CPM	• DRPMs **always** start on time, with everyone present • DRPMs are always at least 7 days before every CPM

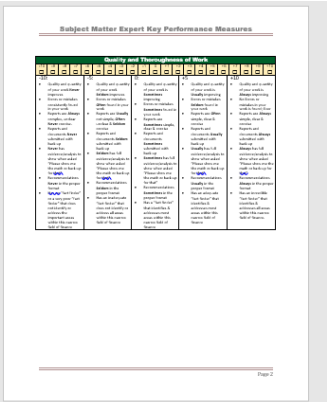
Create Subject Matter Expert Key Performance Measures

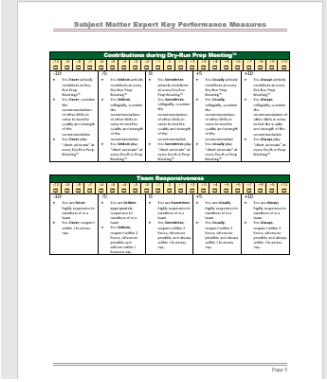
&

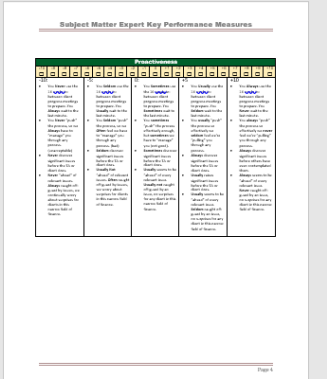
Create Administrative Manager Key Performance Measures

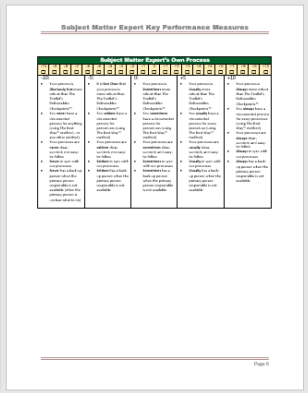
Subject Matter Expert

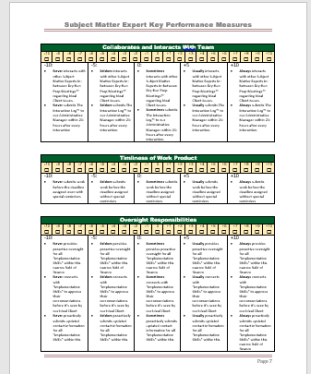
Key Performance Measures

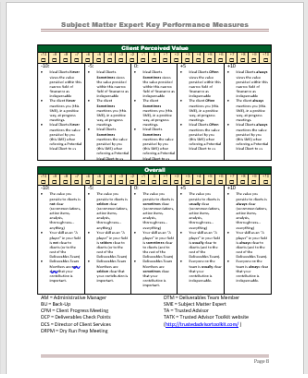






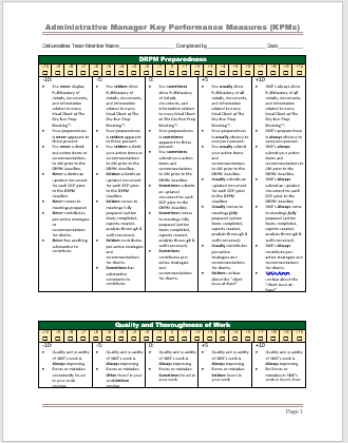






Administrative Manager

Key Performance Measures


Administrative Manager Key Performance Measures (KPMs)

Deliverables Team Member Name: _____ Complete by: _____ Date: _____

DRPM Preparedness

-$100	-$50	$0	+$5	+$10
You never display PLAN delivery of deliverables, information related to every Dry Run Prep Meeting™. You never book any entire items on recommendations to ARI prior to the Dry Run Prep Meeting™. Never a book or updated document for each SOP prior to the DRPM deadline. Never comes to meeting prepared. Never contributes pre-strive strategies to recommendations for clients. Never has anything substantive to contribute.	You seldom show PLAN delivery of deliverables, information related to every Dry Run Prep Meeting™. You rarely book any entire items on recommendations to ARI prior to the Dry Run Prep Meeting™. You seldom book a your entire items on recommendations to ARI prior to the Dry Run Prep Meeting™. You seldom submit an updated document for each SOP prior to the DRPM deadline. Sometimes comes to meetings fully prepared (written items completed, reports created, analysis thrown up) & well-reviewed. Sometimes contributes pre-strive strategies to clients.	You sometimes show PLAN delivery of deliverables, information related to every Dry Run Prep Meeting™. You sometimes book a your entire items on recommendations to ARI prior to the Dry Run Prep Meeting™. You sometimes submit on a written items and recommendations to ARI prior to the DRPM deadline. Usually submits on a updated document for each SOP prior to the DRPM deadline. Usually comes to meeting fully prepared (written items completed, reports created, analysis thrown up) & well-reviewed. Usually contributes pre-strive strategies and recommendations to clients.	You usually show PLAN delivery of all deliverables, information related to every Dry Run Prep Meeting™. You usually book a your entire items on recommendations to ARI prior to the Dry Run Prep Meeting™. You usually submit a written items and recommendations to ARI prior to the DRPM deadline. Usually submits on a updated document for each SOP prior to the DRPM deadline. Usually comes to meeting fully prepared (written items completed, reports created, analysis thrown up) & well-reviewed. Usually contributes pre-strive strategies and recommendations to clients. Often, but not always, contributes "above and beyond"	SME's always show PLAN delivery of all deliverables, information related to every Dry Run Prep Meeting™. SME's always book a your entire items on recommendations to ARI prior to the Dry Run Prep Meeting™. SME's always submit on a written items and recommendations to ARI prior to the DRPM deadline. SME's always submit an updated document for each SOP prior to the DRPM deadline. SME's always come to meeting fully prepared (written items completed, reports created, analysis thrown up) & well-reviewed. SME's always contribute pre-strive strategies and recommendations to clients. Often, but not always, contributes "above and beyond"

Quality and Thoroughness of Work

-$100	-$50	$0	+$5	+$10
Quality and quantity of SME's work is consistently poor. Errors or mistakes consistently fix and or your work review.	Quality and quantity of SME's work is frequently poor. Errors or mistakes Often found in your work before review.	Quality and quantity of SME's work is acceptable. Errors or mistakes Sometimes fix and or your work.	Quality and quantity of SME's work is above average. No Errors or mistakes in SME's work is found. Error	Quality and quantity of SME's work is outstanding. No Errors or mistakes in SME's work is found. Error

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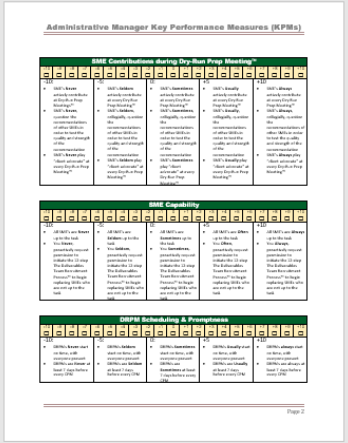
Administrative Manager Key Performance Measures (KPMs)

SME Contributions during Dry-Run Prep Meeting™

-$100	-$50	$0	+$5	+$10
SME's never actively contribute during Dry-Run Prep Meeting™. SME's never, consider the recommendations of other SMEs as value to lead the quality and strength of the recommendation. SME's never play "client advocate" at every Dry-Run Prep Meeting™.	SME's seldom actively contribute during Dry-Run Prep Meeting™. SME's seldom, collegially, consider the recommendations of other SMEs as value to lead the quality and strength of the recommendation. SME's seldom play "client advocate" at every Dry-Run Prep Meeting™.	SME's sometimes actively contribute during Dry-Run Prep Meeting™. SME's Sometimes, collegially, consider the recommendations of other SMEs as value to lead the quality and strength of the recommendation. SME's sometimes play "client advocate" at every Dry-Run Prep Meeting™.	SME's usually actively contribute during Dry-Run Prep Meeting™. SME's Usually, collegially, consider the recommendations of other SMEs as value to lead the quality and strength of the recommendation. SME's Usually play "client advocate" at every Dry-Run Prep Meeting™.	SME's always actively contribute during Dry-Run Prep Meeting™. SME's always, collegially, consider the recommendations of other SMEs as value to lead the quality and strength of the recommendation. SME's always play "client advocate" at every Dry-Run Prep Meeting™.

SME Capability

-$100	-$50	$0	+$5	+$10
All SME's are Never up to the task. You Never, consistently request permission to initiate this 10 step process. You Never Execute Executive Process™ to begin exploring SMEs who are up to the task.	All SME's are Often up to the task. You Often, consistently request permission to initiate this 10 step process. You Often Execute Executive Process™ to begin exploring SMEs who are up to the task.	All SME's are Sometimes up to the task. You Sometimes, consistently request permission to initiate this 10 step process. You Sometimes Execute Executive Process™ to begin exploring SMEs who are up to the task.	All SME's are Often up to the task. You Often, consistently request permission to initiate this 10 step process. You Often Execute Executive Process™ to begin exploring SMEs who are up to the task.	All SME's are always up to the task. You always, consistently request permission to initiate this 10 step process. You always Execute Executive Process™ to begin exploring SMEs who are up to the task.

DRPM Scheduling & Promptness

-$100	-$50	$0	+$5	+$10
DRPMs, Never start on time, with everyone present. Never scheduled at least 7 days before every DRM.	DRPMs, Seldom start on time, with everyone present. Seldom scheduled at least 7 days before every DRM.	DRPMs, Sometimes start on time, with everyone present. Sometimes scheduled at least 7 days before every DRM.	DRPMs, Usually start on time, with everyone present. Usually scheduled at least 7 days before every DRM.	DRPMs, always start on time, with everyone present. Always scheduled at least 7 days before every DRM.

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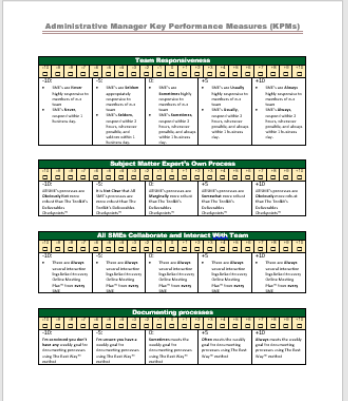

Administrative Manager Key Performance Measures (KPMs)

Team Responsiveness

-$100	-$50	$0	+$5	+$10
SME's are Never highly responsive to requests of our team. SME's Never, response within 1 business day.	SME's are Seldom appropriately responsive to requests of members of our team. SME's Sometimes, response within 2 business days, unless otherwise unavailable, and always within 1 business day.	SME's are Sometimes highly responsive to requests of members of our team. SME's Sometimes, response within 2 business days, unless otherwise unavailable, and always within 1 business day.	SME's are Usually highly responsive to requests of members of our team. SME's usually response within 2 hours, otherwise unavailable, and always within 1 business day.	SME's are Always highly responsive to requests of members of our team. SME's always, response within 2 hours, otherwise unavailable, and always within 1 business day.

Subject Matter Expert's Own Process

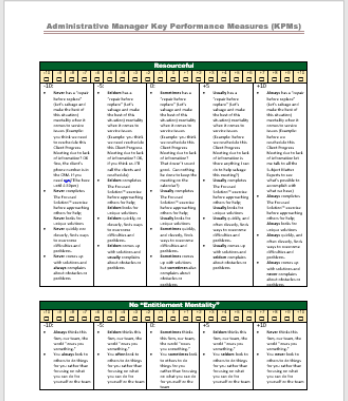
-$100	-$50	$0	+$5	+$10
All SME's process are Never Executive Solutions™ more robust than The Toolkit's Deliverables Templates™.	It is Not Clear that All SME's process are more robust than The Toolkit's Deliverables Templates™.	All SME's processes are Sometimes more robust than The Toolkit's Deliverables Templates™.	All SME's processes are Usually more robust than The Toolkit's Deliverables Templates™.	All SME's processes are Always more robust than The Toolkit's Deliverables Templates™.

All SMEs Collaborate and Interact With Team

-$100	-$50	$0	+$5	+$10
There are Always several interactive high-fliers in every Dry-Run Prep™ team every week.	There are Always several interactive high-fliers in every Dry-Run Prep™ team every week.	There are Always several interactive high-fliers in every Dry-Run Prep™ team every week.	There are Always several interactive high-fliers in every Dry-Run Prep™ team every week.	There are Always several interactive high-fliers in every Dry-Run Prep™ team every week.

Documenting processes

-$100	-$50	$0	+$5	+$10
I've received you don't have any readily goal for documenting processes using The Real-Time™ method.	I'm unsure you have a readily goal for documenting processes using The Real-Time™ method.	Sometimes meets the readily goal for documenting processes using The Real-Time™ method.	Usually meets the readily goal for documenting processes using The Real-Time™ method.	Often meets the readily goal for documenting processes using The Real-Time™ method.

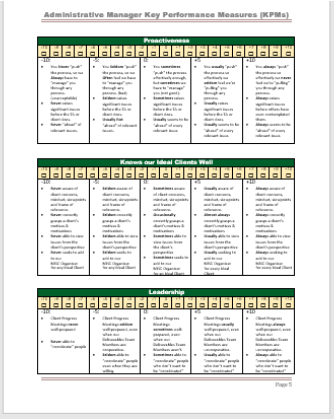

Administrative Manager Key Performance Measures (KPMs)

Resourceful

-$100	-$50	$0	+$5	+$10
Never has a "can-do" attitude ("can't" colleague and make the best of the situation), mentality when it comes to finding resources (Example: you think you would need Client Progress Meeting due to lack of information? Ok fine, this doesn't mean you have to do the Client Progress Meeting, you'll just have to find another way). Never completes the Personal Solution™ exercise before approaching others for help. Never looks for solutions quickly on their own. Never actively uses diversity, lists ways to overcome challenges and problems. Never comes up with solutions and usually complains about obstacles or problems.	Seldom has a "can-do" attitude ("can't" colleague and make the best of the situation), mentality when it comes to finding resources (Example: you think you would need Client Progress Meeting due to lack of information? Ok fine, this doesn't mean you have to do the Client Progress Meeting, you'll just have to find another way). Often completes the Personal Solution™ exercise before approaching others for help. Seldom looks for solutions quickly on their own. Seldom actively uses diversity, lists ways to overcome challenges and problems. Seldom comes up with solutions and usually complains about obstacles or problems.	Sometimes has a "can-do" attitude ("can't" colleague and make the best of the situation), mentality when it comes to finding resources (Example: you think you would need Client Progress Meeting due to lack of information? That doesn't mean you have to do the Client Progress Meeting, you'll just have to find another way). Sometimes completes the Personal Solution™ exercise before approaching others for help. Sometimes looks for solutions quickly on their own. Sometimes actively uses diversity, lists ways to overcome challenges and problems. Sometimes comes up with solutions and sometimes complains about obstacles or problems.	Usually has a "can-do" attitude ("can't" colleague and make the best of the situation), mentality when it comes to finding resources (Example: before you think you would need Client Progress Meeting due to lack of information? Usually completes the Personal Solution™ exercise before approaching others for help. Usually looks for solutions quickly on their own. Usually actively uses diversity, lists ways to overcome challenges and problems. Usually comes up with solutions and usually complains about obstacles or problems.	Always has a "can-do" attitude ("can't" colleague and make the best of the situation), mentality when it comes to finding resources (Example: before you think you would need Client Progress Meeting due to lack of information? Always completes the Personal Solution™ exercise before approaching others for help. Always looks for solutions quickly on their own. Always actively uses diversity, lists ways to overcome challenges and problems. Always comes up with solutions and rarely complains about obstacles or problems.

No "Entitlement Mentality"

-$100	-$50	$0	+$5	+$10
Always thinks this team "owes" them something". Always looks to others for things they think they are "entitled" to, focusing on what you can do for yourself or the team.	Often thinks this team "owes" them something". Often looks to others for things they think they are "entitled" to, focusing on what you can do for yourself or the team.	Sometimes thinks this team "owes" them something". Sometimes looks to others for things they think they are "entitled" to, rather than focusing on what you can do for yourself or the team.	Usually thinks this team "owes" them something". Usually looks to others for things they think they are "entitled" to, rather than focusing on what you can do for yourself or the team.	Never thinks this team "owes" them something". Never looks to others for things they think they are "entitled" to, rather than focusing on what you can do for yourself or the team.


Administrative Manager Key Performance Measures (KPMs)

Proactiveness

-$100	-$50	$0	+$5	+$10
You Never "push" the process, so we Always have to "push" you through any process. Rarely comes completely. Never comes to meetings with a set of relevant issues.	You Seldom "push" the process, so we Often have to "push" you through any process. Rarely comes with significant issues to the table. Rarely comes to meetings with a set of relevant issues.	You sometimes "push" the process effectively enough so we rarely have to "push" you through any process. Usually comes with significant issues to the table. Usually comes to meetings with a set of relevant issues.	You usually "push" the process so effectively so we never have to "push" you through any process. Usually comes with significant issues to the table. Usually comes to meetings with a set of relevant issues.	You always "push" the process so effectively so never have to "push" you through any process. Always comes with significant issues to the table. Always comes to meetings with a set of relevant issues.

Knows our Ideal Clients Well

-$100	-$50	$0	+$5	+$10
Never aware of our ideal clients, their needs, and frame of reference. Never consistently grasps a client's motives & motivations. Never comes to meetings with the client's perspective. Never watches or reads our ideal Client Value.	Seldom aware of our ideal clients, their needs, and frame of reference. Seldom consistently grasps a client's motives & motivations. Seldom comes to meetings with the client's perspective. Seldom watches or reads our ideal Client Value.	Sometimes aware of our ideal clients, their needs, and frame of reference. Sometimes consistently grasps a client's motives & motivations. Sometimes comes to meetings with the client's perspective. Sometimes watches or reads our ideal Client Value.	Usually aware of our ideal clients, their needs, and frame of reference. Usually consistently grasps a client's motives & motivations. Usually comes to meetings with the client's perspective. Usually watches or reads our ideal Client Value.	Always aware of our ideal clients, their needs, and frame of reference. Always consistently grasps a client's motives & motivations. Always comes to meetings with the client's perspective. Always watches or reads our ideal Client Value.

Leadership

-$100	-$50	$0	+$5	+$10
Client Progress Meetings never well-prepared. Never allow to "overshoot" people	Client Progress Meetings seldom well-prepared, even when they are willing. Seldom allow to "overshoot" people even when they are willing	Client Progress Meetings sometimes well-prepared, even when we Stakeholders Team Members are willing. Sometimes allow to "overshoot" people even when they are willing	Client Progress Meetings usually well-prepared, even when we Stakeholders Team Members are willing. Usually allow to "overshoot" people even when they are willing	Client Progress Meetings always well-prepared, even when we Stakeholders Team Members are willing. Always allow to "overshoot" people even when they are willing

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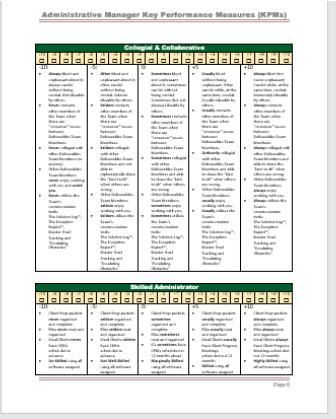
Administrative Manager Key Performance Measures (KPMs)

Collegial & Collaborative

-$100	-$50	$0	+$5	+$10
Always blunt and unpleasant almost to always careful without being unnecessarily hurtful to others. Never overreacts to pressure. Never "accuses" Team Members. Never colleagial with other Deliverables Team Members. Never within the Team's consensus-taker tools. Never "The Solution Log™", "The Exception Report™", Master Tool Tracking and "Escalating Obstacles".	Often blunt and unpleasant almost to sometimes careful without being unnecessarily hurtful to others. Seldom overreacts to pressure. Seldom "accuses" Team Members. Seldom colleagial with other Deliverables Team Members and only occasionally does so within the Team's consensus-taker tools. Seldom uses "The Solution Log™", "The Exception Report™", Master Tool Tracking and "Escalating Obstacles".	Sometimes blunt and unpleasant almost to sometimes careful without being unnecessarily hurtful to others. Sometimes overreacts to pressure. Sometimes "accuses" Team Members. Sometimes colleagial with other Deliverables Team Members and only sometimes does so within the Team's consensus-taker tools. Sometimes uses "The Solution Log™", "The Exception Report™", Master Tool Tracking and "Escalating Obstacles".	Usually blunt and unpleasant almost to without being unnecessarily hurtful to others. Usually overreacts to pressure. Usually "accuses" Team Members. Usually colleagial with other Deliverables Team Members and usually does so within the Team's consensus-taker tools. Usually uses "The Solution Log™", "The Exception Report™", Master Tool Tracking and "Escalating Obstacles".	Always blunt and unpleasant almost to without being unnecessarily hurtful to others. Always overreacts to pressure. Always "accuses" Team Members. Always colleagial with other Deliverables Team Members and always does so within the Team's consensus-taker tools. Always uses "The Solution Log™", "The Exception Report™", Master Tool Tracking and "Escalating Obstacles".

Skilled Administrator

-$100	-$50	$0	+$5	+$10
Client Prep packets never complete and complete. Files never exist and organized. Never consistently uses Client Progress Meetings when client at 12 months. Never knowledgeable using all software assigned.	Client Prep packets rarely complete and complete. Files rarely exist and organized. Seldom consistently uses Client Progress Meetings when client at 12 months. Seldom knowledgeable using all software assigned.	Client Prep packets sometimes complete and complete. Files sometimes exist and organized. Sometimes consistently uses Client Progress Meetings when client at 12 months. Sometimes knowledgeable using all software assigned.	Client Prep packets usually complete and complete. Files usually exist and organized. Usually consistently uses Client Progress Meetings when client at 12 months. Usually knowledgeable using all software assigned.	Client Prep packets always complete and complete. Files always exist and organized. Always consistently uses Client Progress Meetings when client at 12 months. Always knowledgeable using all software assigned.

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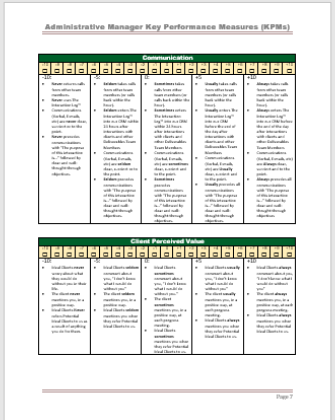
Administrative Manager Key Performance Measures (KPMs)

Communication

-$100	-$50	$0	+$5	+$10
Never returns calls from other team members. Never uses the communication tools (Outlook, E-mail, etc) we mostly use. Never provides constructive feedback with "The progress of the project is..." followed by clear and well-thought-through objectives.	Seldom returns calls from other team members (or calls back within the hour). Seldom uses the communication tools (Outlook, E-mail, etc) we mostly use. Seldom provides constructive feedback with "The progress of the project is..." followed by clear and well-thought-through objectives.	Sometimes returns calls from other team members (or calls back within the hour). Sometimes uses the communication tools (Outlook, E-mail, etc) we mostly use. Sometimes provides constructive feedback with "The progress of the project is..." followed by clear and well-thought-through objectives.	Usually returns calls from other team members (or calls back within the hour). Usually uses the communication tools (Outlook, E-mail, etc) we mostly use. Usually provides constructive feedback with "The progress of the project is..." followed by clear and well-thought-through objectives.	Always returns calls from other team members (or calls back within the hour). Always uses the communication tools (Outlook, E-mail, etc) we mostly use. Always provides constructive feedback with "The progress of the project is..." followed by clear and well-thought-through objectives.

Client Perceived Value

-$100	-$50	$0	+$5	+$10
Visual Clients never worry about what we do or how we do it. Visual Clients never receive positive responses. Visual Clients Never receive compliments from other Visual Clients as a result of anything you do for them.	Visual Clients seldom comment about what we do without you. Visual Clients seldom receive positive responses. Visual Clients Seldom receive compliments from other Visual Clients as a result of anything you do for them.	Visual Clients sometimes comment about what we do without you. Visual Clients sometimes receive positive responses. Visual Clients sometimes receive compliments from other Visual Clients as a result of anything you do for them.	Visual Clients usually comment about what we do without you. Visual Clients usually receive positive responses. Visual Clients usually receive compliments from other Visual Clients as a result of anything you do for them.	Visual Clients always comment about what we do without you. Visual Clients always receive positive responses. Visual Clients always receive compliments from other Visual Clients as a result of anything you do for them.

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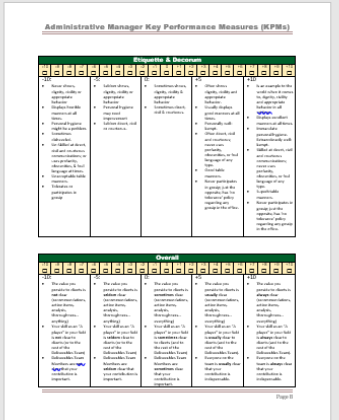
Administrative Manager Key Performance Measures (KPMs)

Etiquette & Decorum

-$100	-$50	$0	+$5	+$10
Never shows signals, civility or professional behavior. Employs inordinate amounts of Personal Hygiene ought be a problem. Sometimes has bad breath or bad body odor at clients and we ourselves. Sometimes has bad breath or bad body odor at clients and we ourselves. Sometimes has bad breath or bad body odor at clients and we ourselves