ADVISOR PACT™

PROTECTION ATTENTION COORDINATION TRANSPARENCY

The Monthly Session

Monthly Advice Session

November 15, 2022

With Host Mark McKenna Little

ADVISOR **PACT**

Marque Little ▼

Dog-Eared

Dashboard

Preferences

Contact Us

Log out

Search Site

Home | News | The Monthly Session™ | The Monthly Project™ | FAQ

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.

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...

https://advisorpact.com/useractions

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

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

Mark McKenna Little
Mark McKenna Little | Founder/Creator | The Mark of Mastery™ For Financial Advisors
www.TheMarkOfMastery.com
https://themarkofmastery.com/

Questions

- ✓ Time & Priority Management
  - ✓ “Mark, I don’t seem to have enough time to get everything done, What do you recommend for my time & priority management?”

- ✓ Tracking – NEW FEATURE Rollout
  - ✓ Tracking Client Service
  - ✓ NEW: Tracking Client Acquisition Activities

Your 2 Highest Priorities

1. **Client Service**:
   Achieving The Team Goal

2. **Client Acquisition**:
   Achieving my revenue goals

ADVISOR PACT

Tracking your 2 Priorities

1. Tracking Client Service Effectiveness

2. NEW: Tracking Client Acquisition Activities

Tracking Client Service Effectiveness

- ✓ **The #1 Priority is Client Service**
  - ✓ **Defined: Delivering on the promises we made to each client at the beginning of the relationship**
  - ✓ **Execution: Ensuring every team member is contributing to The Team Goal**
  - ✓ **Measurement of Success: The Annual Referral Rate™ (TARR - Client Referral Rate)**

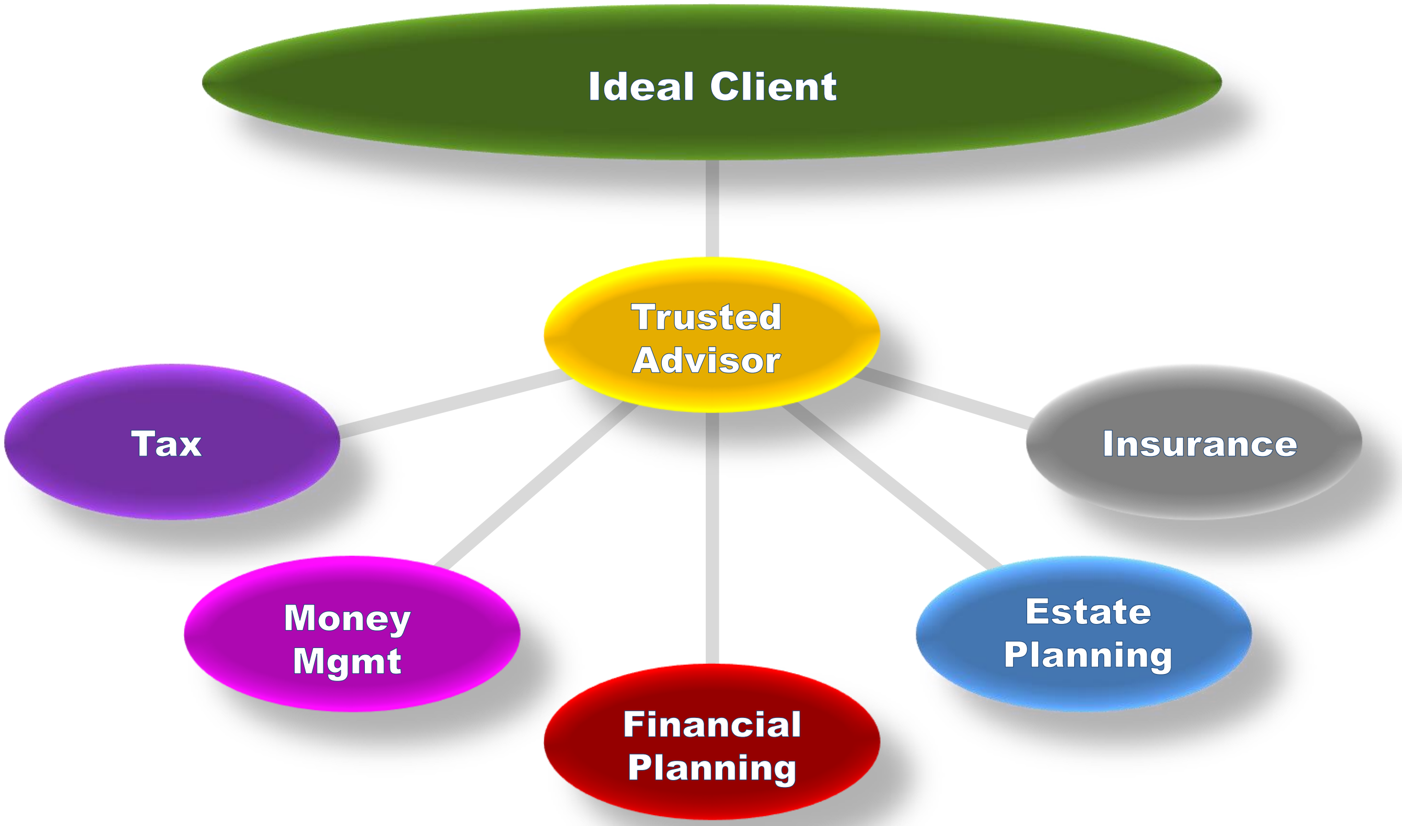
What is
The Team Goal?

(write this down)

The Team Goal

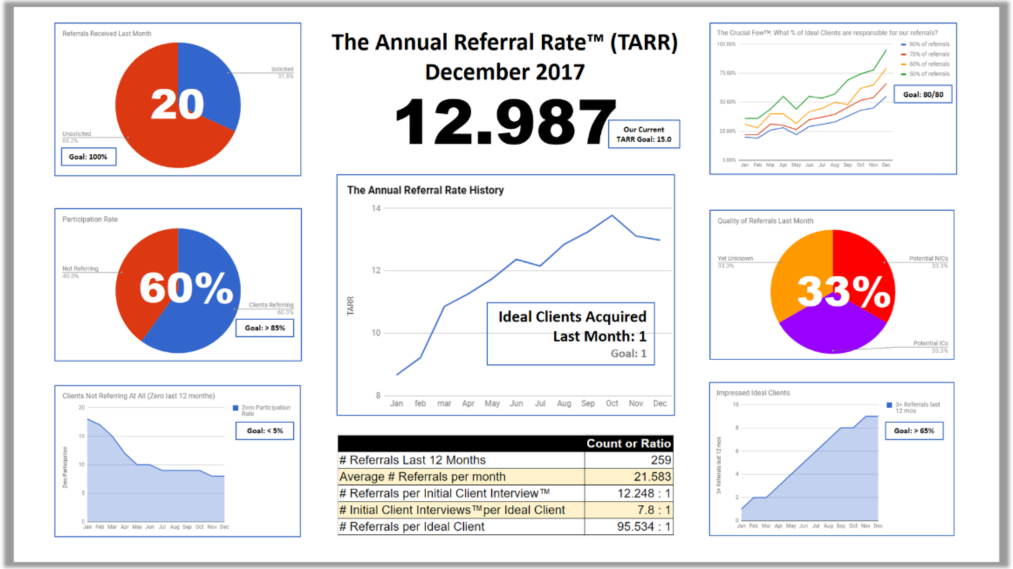
- ✓ **GOAL**: Our Team Goal is to consistently exceed **every** Ideal Client’s expectations
- ✓ **MEASURE**: As measured by a **RISING** annual client referral rate (TARR)
- ✓ **PARTICIPATION**: EVERY Deliverables Team Member agrees to **CONTRIBUTE** to our Team Goal (SUSO)

Every SME provides 10-15 Above-average Action Items per client per year



Tracking Client Service Effectiveness

- ✓ **Has always been provided in this program…**
  - ✓ **Module 15: The Referability Dashboard™**



November 15, 2022

ADVISOR PACT

Marque Little ▼

ADVISOR PACT

Search Site | Search

How is Advisor PACT™ related to The Trusted Advisor Toolkit™?
The First 15 Modules: Titles and Descriptions
What is the Advisor PACT™ (or Toolkit) "Fast Track"?
What is The Trusted Advisor Toolkit™ (aka: The Flagship Product)?
What is the Time Commitment for The AdvisorPACT Monthly Program™

You are here: Home / FAQ

FAQ

Answers to the most commonly asked questions related to The AdvisorPACT Monthly Program™

How is Advisor PACT™ related to The Trusted Advisor Toolkit™?

The first 15 modules of The Advisor P.A.C.T. Monthly Program™ are the exact same ones as in The Trusted Advisor Toolkit™ (our flagship product). We ask Financial Advisors interested in The Toolkit to start with this entry level program since it's so much less expensive.

Read More...

The First 15 Modules: Titles and Descriptions

Each month you'll receive the next module in the series for a period of 30 or 60 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.

Read More...

What is the Advisor PACT™ (or Toolkit) "Fast Track"?

For those who want to qualify for The Trusted Advisor Toolkit™ as soon as possible, The Advisor P.A.C.T. Monthly Program™ (APM) has a "Fast Track" option which allows an Advisor to progress as fast as they are able to implement each module.

Read More...

What is The Trusted Advisor Toolkit™ (aka: The Flagship Product)?

Our Flagship product (called The Trusted Advisor Toolkit™) is training, support and software to deliver Truly Comprehensive

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...

Client Service

Tracking Client Satisfaction

ADVISOR PACT

Search Site | Search

Home | News | The Monthly Session™ | The Monthly Project™ | FAQ

- How is Advisor PACT™ related to The Trusted Advisor Toolkit™?
- The First 15 Modules: Titles and Descriptions
- What is the Advisor PACT™ (or Toolkit) "Fast Track"?
- What is The Trusted Advisor Toolkit™ (aka: The Flagship Product)?
- What is the Time Commitment for The AdvisorPACT Monthly Program™

You are here: Home / FAQ / The First 15 Modules: Titles and Descriptions

The First 15 Modules: Titles and Descriptions

Each month you'll receive the next module in the series for a period of 30 or 60 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 F. 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.

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

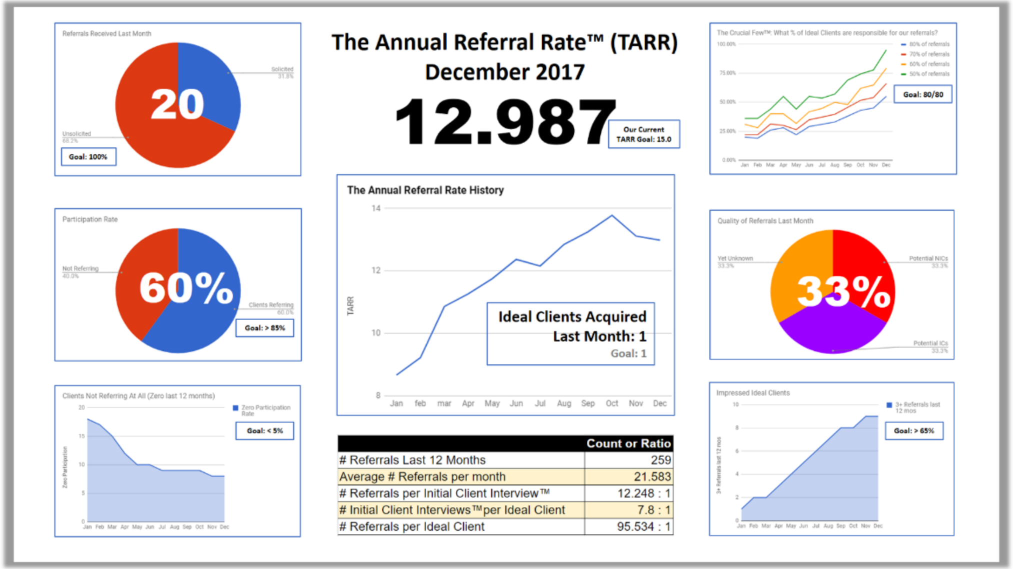
More news…

The Annual Referral Rate and Referability Dashboard

By exceeding client expectations, you can increase the quantity and quality of referrals you receive. Here's how to accurately measure your progress.

Tracking **Client Service** Effectiveness

- ✓ **Has always been provided in this program…**
  - ✓ **Module 15: The Referability Dashboard™**



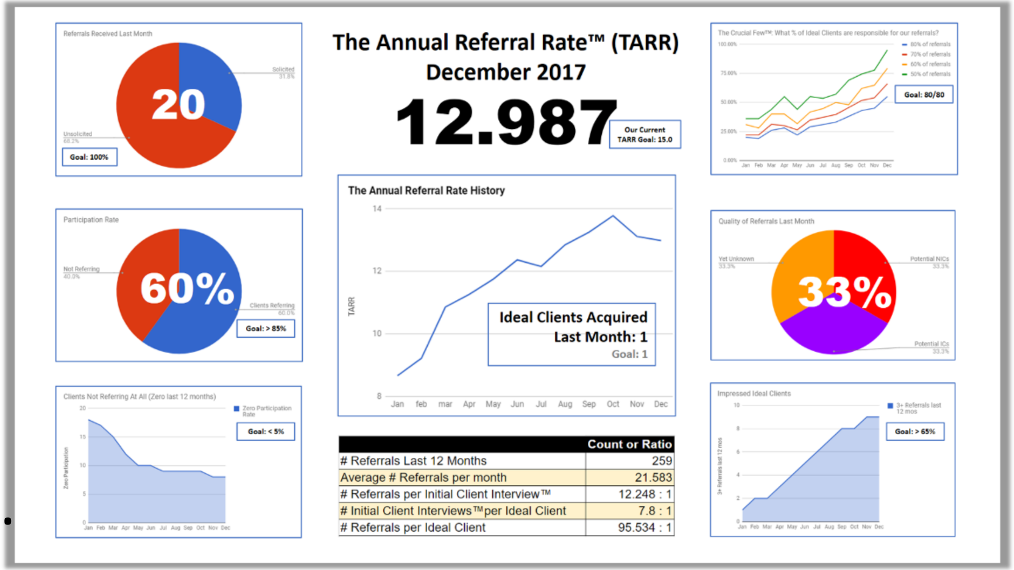
	Count or Ratio
# Referrals Last 12 Months	259
Average # Referrals per month	21.583
# Referrals per Initial Client Interview™	12.248 : 1
# Initial Client Interviews™ per Ideal Client	7.8 : 1
# Referrals per Ideal Client	95.534 : 1

November 15, 2022

ADVISOR PACT

MONTHLY REPORT: Previous 12 mo.s

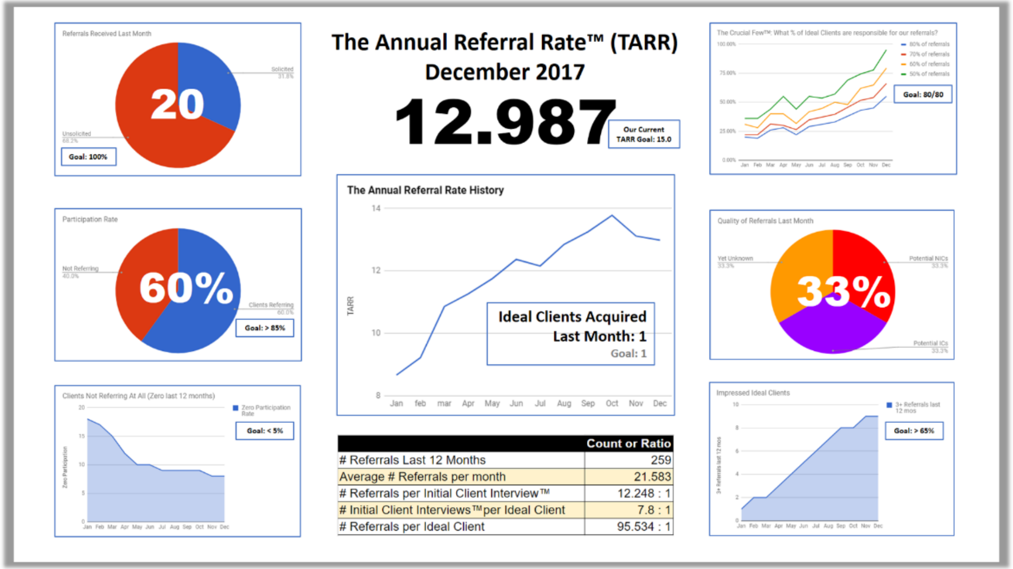
- Client Referral Rate (TARR)
- # Referrals last month
- # Referrals last 12 mo.s
- Participation rate %
- % ICs NOT referring
- Quality of referrals
- Solicited v. Unsolicited
- Average referrals per mo.
- # Financial Road Maps®



ADVISOR PACT

Tracking Client Service Effectiveness

So, we've always provided you this primary method of tracking your #1 highest priority…



November 15, 2022

ADVISOR PACT

Your 2 Highest Priorities

1. **Client Service:**
   Achieving The Team Goal

2. **Client Acquisition:**
   Achieving my revenue goals

So how do we track **Client Acquisition** effectiveness?

Our 3 Programs

1. The **Advisor P.A.C.T. Monthly** Program™: THIS PROGRAM (DIY CS)
2. The **Trusted Advisor Toolkit**™: Software entering Ideal Clients & SMES to create checklists (DWY CS)
3. The Financial Advisor Mastery Program (one-on-one CA consulting)

Rolling Out To You…

We're now providing you with how we track Client Acquisition in the FAM Program

November 15, 2022

ADVISOR PACT

Now you're able track **Client Acquisition** the EXACT way I track it for myself

We recommend you track Client Acquisition daily, in real-time… …and update your tracking report weekly

Look for an email from us to set up your tracking folder

In a minute I'll show you…

- ✓ **What's most important to track weekly**
- ✓ **The 3 critical metrics to watch (what matters most)**

Now let's go look at your **tracking folder**

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

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

Mark McKenna Little

Mark McKenna Little | Founder/Creator | The Mark of Mastery™ For Financial Advisors
www.TheMarkOfMastery.com
https://themarkofmastery.com/

ADVISOR | PACT™

The Only Game in Town

Protection
Attention
Coordination
Transparency