



The Advisor PACT Monthly Session™

March 15, 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



Issues Covered Today

- ✓ How do we **improve** client service as we grow
(add client value as we add Ideal Clients): Scalability
- ✓ Review of the **initial** sequence of projects as you
implement Truly Comprehensive Financial Services™



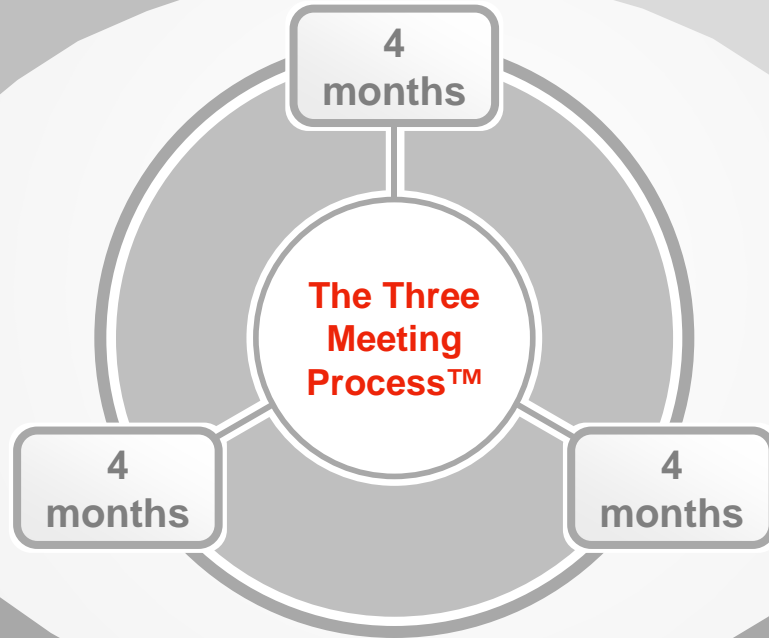
Question

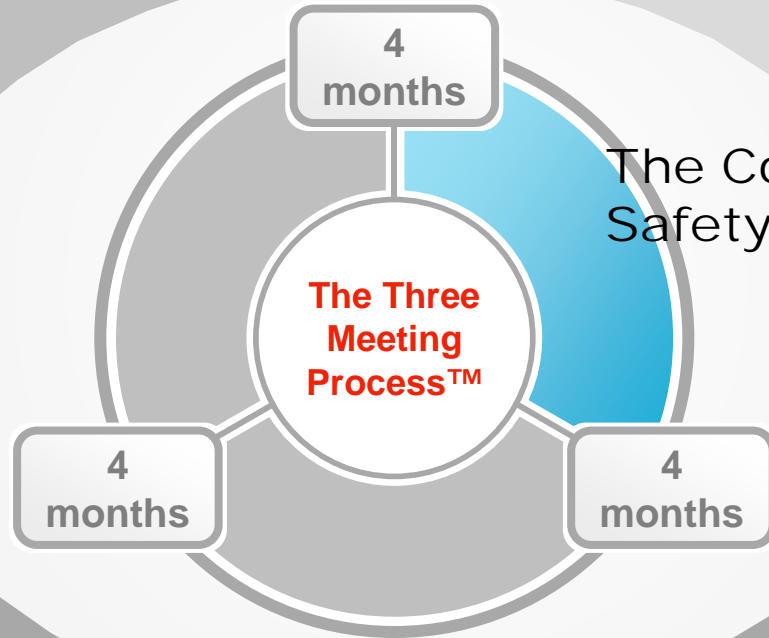
Since we're coming upon "tax season" we were thinking about concentrating all of The Annual Review™ meetings into March and April, so our Tax Planning Subject Matter Expert can meet with everyone, and then giving our team a break in May and June (give them 2 months off with no client meetings).



Don't do it

First, Let's Recall
The **Three**
Meeting Process™





The Comprehensive
Safety Review™



The Goal Progress
Outlook™

The Annual Review™



The Annual Review™

4
months

The Comprehensive
Safety Review™

**The Three
Meeting
Process™**

4
months

4
months

The Goal Progress
Outlook™



Implementing The Three Meeting Process™ Means

Your Team Will Conduct
3 Meetings Per Ideal **Client** Per **year**

Meet with every client once **every 4 months**

Hypothetical

Let's say a Trusted Advisor has
24 Ideal Clients...

Here's how The Three Meeting Process™ will work

24 Ideal Clients

Annual Meeting Count

Meeting	Annual Meeting Count
The Annual Review™	24
The Comprehensive Safety Review™	24
The Goal Progress Outlook™	24
Total number of client progress meetings annually	72

The On-Going Requirements For The Three Meeting Process™

1. No month has any more or less **client progress meetings** than any other month
2. No month has any more or less **meeting types** than any other month

The On-Going Requirements For The Three Meeting Process™

1. Spread the **number of meetings** evenly throughout the year
2. Spread **meeting types** evenly throughout the year

Why?

Scalability

The On-Going Requirements For The Three Meeting Process™

1. Spread the **number of meetings** evenly throughout the year
2. Spread **meeting types** evenly throughout the year
3. Have 3 meetings on the calendar **at all times** with every Ideal Client

The Three Meeting Process™ (TMP)
Calendar Exercise EXAMPLE 1

Ideal Client Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<i>Rob & Laura Petrie</i>	GPO				AR				CSR			
<i>Alisa Brady</i>		GPO				AR				CSR		
<i>Jerry & Millie Helper</i>				AR				CSR				GPO
<i>Mel Cooley</i>				CSR				GPO				AR
<i>Sally Rogers</i>			GPO				AR				CSR	
<i>Buddy & Pickles Sorrell</i>				GPO				AR				CSR
<i>Ritchie Petrie</i>	CSR				GPO				AR			
<i>Clara Petrie</i>		CSR				GPO				AR		
<i>Stacey Petrie</i>			CSR				GPO				AR	
# Meetings Per Month	2	2	2	3	2	2	2	3	2	2	2	3

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9 Ideal Clients

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The Three Meeting Process™

Best Outcomes

1. Clients know, with certainty, when they will next be speaking with their Trusted Advisor
2. Subject Matter Experts have regular access to clients to gather information and convey recommendations
3. No Ideal Client gets lost in the shuffle
(every client is a big fish in a small pond)
4. Clients are continually served (SMEs are continually working on clients with no breaks in the calendar)

Clients Are Continually Served

- ✓ “A” in Advisor PACT™: Paying **Attention**
- ✓ Allows for advisor time **off**
- ✓ Its one of the reasons why we ask that you only consider Subject Matter Experts who have **at least 2** Admin Support Staff (ample support)
- ✓ Ideal Clients (your best clients) deserve **continual** service, with no time the team is “off”
- ✓ One of the greatest benefits of having a team (backing each other up)

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Question

I've just joined The Advisor P.A.C.T. Monthly Program™.

What is the sequence of the first few things I should be doing?

Preliminary Sequence

For implementing Truly Comprehensive Financial Services™

1. Select a **strong** Administrative Manager
2. Set Administrative Manager **Expectations**
(begin **building** team)
3. Complete The Annual Recurring Revenue Exercise™
(**ARR**)

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For implementing Truly Comprehensive Financial Services™

1. Select a **strong** Administrative Manager
2. Set Administrative Manager **Expectations**
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3. Complete The Annual Recurring Revenue Exercise™
(**ARR**)
4. Structure Your Compensation (Set **PMARR**)
5. Establish your **Ideal** Client Profile (ICP)
6. The Old Way to New Way Conversation (OW/NW™)
7. The Ten **Pivotal** Questions™

The **Ten** Pivotal Questions™

- 1.) What do you do?
- 2.) How do deliver on that (what you promised to clients)?
- 3.) What kind of clients do you serve best?
- 4.) What keeps you in this business?
- 5.) Exactly how do you charge?
- 6.) What exactly do your clients get for what they pay you?
- 7.) Why should I work with you (over other advisors)?
- 8.) What's the process if I become a client?
- 9.) What makes you think I would make a good client?
- 10.) How can I be certain I can trust you (your firm)?

Investing Time To Develop
Concise
Coherent
Conversational
Compelling
responses to
The **Ten** Pivotal Questions™

Will fully equip you with the **optimal** response to
any of hundreds of possible questions a Potential
Ideal Client will ask you