

# LIMITLESS Cultivating COIS Create Your COI Sales Process Transcript

32

00:04:57.360 --> 00:05:06.990

Limitless Adviser: Limiting beliefs Oh, we just talked about this, what are they so you guys read them out because i'm all about the interaction this afternoon somebody read the first one.

33

00:05:09.720 --> 00:05:10.530

Limitless Adviser: Is your false.

34

00:05:12.810 --> 00:05:21.570

Limitless Adviser: True, you just need the right seo wise right the wrong co eyes are a total waste of time what's your number one job with the coi campaign.

35

00:05:23.160 --> 00:05:40.410

Limitless Adviser: Just like clients, so when you think about the prospect process same thing over tiffany is going to show you her model in terms of how she applied or model it's the same thing you have a clearly defined process so that the process decides who lifts up and who lives out.

36

00:05:41.610 --> 00:05:50.190

Limitless Adviser: The process decides that which means you have to apply personal time and energy, except to follow the process show ups in the email right, the message to whatever right what's number two.

37

00:05:53.790 --> 00:05:54.630

Limitless Adviser: true or false.

38

00:05:58.380 --> 00:06:03.090

Limitless Adviser: that's true and false it does happen, but it doesn't have to add oh.

39

00:06:07.320 --> 00:06:12.660

Limitless Adviser: Somebody gets stressful all right, I send them more referrals that I get true or false.

40

00:06:13.740 --> 00:06:14.100

Limitless Adviser: Right.

41

00:06:15.360 --> 00:06:16.920

Limitless Adviser: So why do you keep doing it.

42

00:06:31.290 --> 00:06:34.950

Limitless Adviser: Right, so when you're going to add service like you're going to do the right thing by the client.

43

00:06:35.610 --> 00:06:40.260

Limitless Adviser: But you're also going to be looking for relationships, where they understand the concept of partnership.

44

00:06:41.010 --> 00:06:44.400

Limitless Adviser: Which is they all have clients who also need financial planning.

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00:06:44.850 --> 00:06:51.780

Limitless Adviser: So if you're sending to them and they're not sending you, irrespective of the structure that it says that there's not equity in that relationship it's not reciprocal.

46

00:06:52.230 --> 00:06:59.310

Limitless Adviser: And sometimes that's okay if you're like hey, this is an expert in a specialist that my client needs right thing, then no question without hesitation.

47

00:07:00.180 --> 00:07:04.860

Limitless Adviser: But if it's you're like who am I going to refer every client to who doesn't have a CPA.

48

00:07:05.370 --> 00:07:11.190

Limitless Adviser: Why would you not want to make sure that that person is so utterly aligned with who you are and what you do and how you do it.

49

00:07:11.490 --> 00:07:16.830

Limitless Adviser: And so diggity about it that they're like, of course, when I have an opportunity, I want to send it to tiffany.

50

00:07:17.340 --> 00:07:23.130

Limitless Adviser: yeah reciprocity is the name of the game and remember we're talking about marketing and Center of influence as a marketing strategy.

51

00:07:23.460 --> 00:07:34.410

Limitless Adviser: You Center of influence, who are good for your clients that's a client experience strategy so when you come in here you're looking for the ones where reciprocity exists is a really good point they already have an advisor they refer to.

52

00:07:36.570 --> 00:07:39.390

Limitless Adviser: find another one well what's the beauty of appendage.

53

00:07:41.160 --> 00:07:44.700

Limitless Adviser: They do not have another advisor they refer to that serves your niche.

54

00:07:45.090 --> 00:07:53.970

Limitless Adviser: And if they do wow that's amazing but there's more people right like the odds are overwhelming that when you have an edge, even if they have another advisor, what do you get to say.

55

00:07:54.660 --> 00:08:00.450

Limitless Adviser: hey my name is Kevin and you've probably worked with advisors probably a great relationship, but i'll do my best work with.

56

00:08:02.070 --> 00:08:13.230

Limitless Adviser: seniors right people in this situation, and so, when you have those situations rise and you demonstrate proof of concept credibly consistently concept credibly consistently please write that down.

57

00:08:14.070 --> 00:08:24.210

Limitless Adviser: i'll build it into the PowerPoint next year right credibility the concept consistently proof of concept which is I you can trust me, which is the big deal with us.

58

00:08:24.930 --> 00:08:35.760

Limitless Adviser: Jeff what's next CPA think i'm gonna steal their tax prep work do you all want their tax prep work oh yeah you're like no please take all my tax prep work for anyone that doesn't.

59

00:08:36.960 --> 00:08:39.600

Limitless Adviser: So, but that's the conversation to be had.

60

00:08:40.920 --> 00:08:44.010

Limitless Adviser: what's The easiest way to solve for that if it's really a concern.

61

00:08:47.340 --> 00:08:48.000

Non solicit.

62

00:08:49.710 --> 00:08:55.320

Limitless Adviser: hey i'm a CPA you're if you're a CPA then it really gets wonky i'm a CPA your CPA but I.

63

00:08:55.560 --> 00:09:06.660

Limitless Adviser: use that tax on shipping of my clients, but I also know my values financial planning, this is what you do all day every day i'm not going to keep up with both I don't want you to feel like i'm ever going to take your clients that's going to compromise it happy signing on to listen.

64

00:09:08.010 --> 00:09:16.170

Limitless Adviser: And nobody's ever made that offer to them before I promise you has anyone run into CPA that's worried about you stealing from you have.

65

00:09:24.360 --> 00:09:28.470

Limitless Adviser: And then they find out it's not quite that easy trust me because they paid me really good money to fix it.

66

00:09:29.520 --> 00:09:36.030

Limitless Adviser: No joke i'm one of them right now all right, I gave your name to someone who didn't call problem.

67

00:09:37.680 --> 00:09:43.440

Limitless Adviser: Anybody have that problem oh you're great you're amazing I gave you this leading call what's the what's the breakdown there.

68

00:09:45.870 --> 00:09:47.970

Limitless Adviser: I don't want you know how we can actually connect yeah.

69

00:09:48.480 --> 00:09:56.190

Limitless Adviser: you're like asking them to connect the dots education moment yeah you're not saying like hey I know that people get busy you're going to get my name out and the odds are overwhelming.

70

00:09:56.490 --> 00:10:01.350

Limitless Adviser: That this is going to kind of get sit on the kitchen table so would it be okay, if I followed up with you in a few weeks.

71

00:10:01.590 --> 00:10:11.580

Limitless Adviser: If we hadn't forgiven Bob and Jane because the issues you mentioned are actually really important and whether it's working with me or just giving you some resources you reached out to me and I want to make sure that I help you solve that problem that'd be okay.

72

00:10:12.720 --> 00:10:14.010

Limitless Adviser: Is that person going to say no.

73

00:10:15.360 --> 00:10:16.050

Limitless Adviser: And if they do you.

74

00:10:17.760 --> 00:10:19.650

Limitless Adviser: And then, what next, what do you now have permission to do.

75

00:10:21.510 --> 00:10:23.370

Limitless Adviser: And what are they going to learn, after a couple of times.

76

00:10:25.410 --> 00:10:29.250

Limitless Adviser: your word trust factor, and then you get to say you earn the right to say.

77

00:10:29.730 --> 00:10:39.000

Limitless Adviser: hey you know what you've given my name on a couple times I really appreciate your trust and confidence my experience, I think, is now similar to your experience, which is as important as this is people just get busy.

78

00:10:39.540 --> 00:10:48.270

Limitless Adviser: And if we want to serve them in a way that makes them in no way feel like i'm going to try and sell anything to them, one of the things that I found works really works really well is.

79

00:10:48.780 --> 00:10:52.230

Limitless Adviser: hey when that comes up in a client conversation maybe you just say hey.

80

00:10:52.440 --> 00:11:00.570

Limitless Adviser: i've got a great personal and I work with his name is Kevin you know he can answer some questions around your finances, there are a couple of things i'd like you to talk to him about would that be okay with you.

81

00:11:00.930 --> 00:11:13.560

Limitless Adviser: hey would that be okay Kevin and when Kevin's in that moment, because his brain is lazy and efficient and he's sitting across from that client it's not going to be exactly what I said, what is it going to be close what's Kevin going to refer to he's going to go.

82

00:11:14.820 --> 00:11:18.570

Limitless Adviser: From was that thinks that he said okay that's what is brainstorming he's like.

83

00:11:18.840 --> 00:11:32.220

Limitless Adviser: This great guy it's it doesn't have to be perfect, it just has to be closed because you're planting the seed, because their biggest limitation is they don't know how it's not in their memory set like they haven't been conditioned to talk to everybody in that your job is to teach them.

84

00:11:33.300 --> 00:11:39.150

Limitless Adviser: that's all I see is a campaign because it's not just hey i'm awesome please some your clients because i've got a cool T shirt.

85

00:11:40.200 --> 00:11:48.240

Limitless Adviser: You have to DEMO and she's also made a lot of friends yeah lots of friends, that is not finding a job is yes lots of friends so.

86

00:11:48.720 --> 00:11:58.380

Limitless Adviser: You guys are not your friends right they are financial engine, but you want the right relationships so there's a really good reciprocity in quality there I gave your name and to others problem.

87

00:11:59.820 --> 00:12:06.930

Limitless Adviser: And like it happens because some people want to hedge their bets your job is to be the first person on the list because that's the person that they'll call first.

88

00:12:07.320 --> 00:12:12.720

Limitless Adviser: But you also need to understand is sometimes you're going to get those people if you can't educate them to something different.

89

00:12:13.230 --> 00:12:19.800

Limitless Adviser: In which case they might not be we'll talk about like one of your top five to seven, you need to five to seven coi is a really great seven figure practice.

90

00:12:20.220 --> 00:12:23.460

Limitless Adviser: So maybe they're a beating but maybe they're not you're at.

91

00:12:24.270 --> 00:12:32.010

Limitless Adviser: So that's your job is to find the core group of people who you're so aligned with role and approach and philosophy and value proposition.

92

00:12:32.340 --> 00:12:43.230

Limitless Adviser: That you can serve each other support each other, using that team approach and that grows and compounds onto itself, and if you do that with five or seven people, it tends to compound on itself consistent.

93

00:12:43.650 --> 00:12:51.090

Limitless Adviser: So those are the beliefs that tiffany and I sat down and said, like what are the things that come up over and over and over and those tend to be the beliefs, we miss anything done.

94

00:12:58.560 --> 00:12:59.010

portal to.

95

00:13:01.350 --> 00:13:03.090

get them to do a little shout.

96

00:13:06.390 --> 00:13:07.770

out words pilot.

97

00:13:08.970 --> 00:13:09.900

I don't want to.

98

00:13:12.270 --> 00:13:14.130

bother my clients today.

99

00:13:15.480 --> 00:13:22.260

I do my best work with a lot because you're already busy you're already focusing on the careers.

100

00:13:24.330 --> 00:13:32.040

I don't want to worry about setting people exactly so let's listen there's no wrong, but what.

101

00:13:43.710 --> 00:13:45.390

Limitless Adviser: You want the honest answer that question.

102

00:13:46.440 --> 00:13:54.300

Limitless Adviser: yeah it's the same reason that you're hesitant to ask for referrals which makes zero sense to me.

103

00:13:55.410 --> 00:14:07.110

Limitless Adviser: Let me hold on, let me reframe this for you right don has someone you have someone that has come to you and said, could I give you my million or \$2 million worth.

104

00:14:07.620 --> 00:14:15.510

Limitless Adviser: every penny that i've ever saved, basically, could I give it to you Kevin can I trust you with it Kevin says yes, you can.

105

00:14:16.380 --> 00:14:26.610

Limitless Adviser: Because Kevin made some promises so that's the big risk moment that's the big was just going to work out people's brands, for you and for them now you've delivered for those clients.

106

00:14:27.840 --> 00:14:33.120

Limitless Adviser: kevin's delivered those clients and in the moment where we ask ourselves, do I have permission.

107

00:14:34.440 --> 00:14:45.600

Limitless Adviser: To use the delivery on that promise as equity to invest in the the idea that if you know anyone else you would like me to deliver on that promise feel free to send them my way.

108

00:14:46.680 --> 00:14:55.350

Limitless Adviser: We are comfortable sitting across from someone and saying, please give me every penny that you've ever saved because you can count on me, but then, when we demonstrate that they can count on us.

109

00:14:55.590 --> 00:15:07.260

Limitless Adviser: We quake and our boots to say, if you know any other people who need someone they can count on i'm here for

you, it makes zero sense, so you have this huge imposition story.

110

00:15:07.620 --> 00:15:16.410

Limitless Adviser: i'm imposing i'm not asking you to knock on their door with the five people you know who i'm saying in a client meeting or conversation that says hey you know I know you have we.

111

00:15:16.710 --> 00:15:21.000

Limitless Adviser: talked about a lot of financial questions in it, especially when your stock option you plan and your bonus.

112

00:15:21.300 --> 00:15:32.520

Limitless Adviser: I know you have friends at work, that this comes up with, and if any of them are in need of the same kind of trusted advice advice that i'm able to give you I would consider an on an honor and a privilege, if you would you know feel free to give them my number.

113

00:15:33.720 --> 00:15:35.280

Limitless Adviser: that's it it's 30 seconds.

114

00:15:43.650 --> 00:15:55.680

Limitless Adviser: that's the work that's intention, can I show up credibly have I earned the right to ask that's delivery, if you have get over your damn self.

115

00:15:57.000 --> 00:16:03.060

Limitless Adviser: If you haven't fix it fix it if you're not delivering do not ask you have not earned the right.

116

00:16:03.690 --> 00:16:15.360

Limitless Adviser: If you've not showed up to that coi consistently demonstrated proof of concept done incredibly and demonstrated that you compound in a way that those other advisors don't you don't deserve to ask for their clients and their trust.

117

00:16:16.080 --> 00:16:21.930

Limitless Adviser: Because you have not demonstrated that you're different, but the second that you do guess what happens.

118

00:16:24.300 --> 00:16:27.510

Limitless Adviser: Because what are they all looking for the advisor that's different.

119

00:16:28.920 --> 00:16:30.960

Limitless Adviser: And I know you guys think that you're super common.

120

00:16:32.040 --> 00:16:36.840

Limitless Adviser: Because you're all hanging out together but guess what you're not in your town in your city in your geography.

121

00:16:37.860 --> 00:16:47.610

Limitless Adviser: you're not common you work incredibly uncommonly cool and that's your job right to own your awesome and then take that to your CEOs in a structured way so let's.

122

00:16:48.210 --> 00:16:51.420

Limitless Adviser: play one we're going to show you right, so we play the long game.

123

00:16:52.230 --> 00:16:58.050

Limitless Adviser: you're not going to sit down have lunch and have them be like you're the most amazing thing here's five people I can't wait to do this with you who's tried that.

124

00:16:58.530 --> 00:17:07.230

Limitless Adviser: If that's happened great take that to the Bank, but that is not how it usually works, you have to what was that thing I said earlier about investment presenting return when.

125

00:17:08.400 --> 00:17:15.990

Limitless Adviser: Always if you're not willing to make the investment save your energy, this is a long game and by long game, I mean.

126

00:17:16.590 --> 00:17:24.900

Limitless Adviser: Year to three years, depending on some people will love you and six weeks later they'll send you a client how you handle that determines it, but some people you'll be dripping on for two years.

127

00:17:25.740 --> 00:17:33.120

Limitless Adviser: And then one day out of the blue they'll send you a \$17 million client and your job is to discern who to keep dripping on and and what way not.

128

00:17:33.660 --> 00:17:47.970

Limitless Adviser: Which is what we're going to talk about success leaves clues to yes, well, it is a long game there'll be clues and you'll you'll do okay along the way, but when you get the machine going where you just show up and do great work and the referrals come that's the longest.

129

00:17:49.170 --> 00:17:53.430

Limitless Adviser: Alright, so this is yours yeah So if you good eggs regarding Center of influence marketing.

130

00:17:53.790 --> 00:18:03.180

Limitless Adviser: So when I started, I really looked into like what are all the successful advisors doing back in like 2000 I don't even know 1213 and I.

131

00:18:03.480 --> 00:18:08.460

Limitless Adviser: Was examining it and I was like man, they all have like all these relationships and they're always at lunches and I.

132

00:18:09.030 --> 00:18:13.350

Limitless Adviser: I can't even remember, and it was like man they're just in front of people, the entire time how do they manage all of that.

133

00:18:13.650 --> 00:18:26.400

Limitless Adviser: But then when I dug in deeper I recognize they're going to a ton of lunches that aren't actually paying out or coffees and there's like these five to seven people that have been consistently showing up and i'm like, why are they just doubling down on them.

134

00:18:27.870 --> 00:18:35.670

Limitless Adviser: And and that's when I realized like how many five to seven if you got three qualified ideal clients.

135

00:18:36.180 --> 00:18:42.150

Limitless Adviser: from five to seven of those and you had an 80% close rate, because your clothes rates going to go up with Center of influence right.

136

00:18:42.480 --> 00:18:47.850

Limitless Adviser: they're able to dig deeper they're able to understand they're able to like set you up differently than any other marketing.

137

00:18:48.600 --> 00:19:02.220

Limitless Adviser: And if you got that and you've had 15 to 21 new clients and you closed 13 to 18 of them, and they were your ideal clients that's a big year which you have to do everything else.

138

00:19:03.090 --> 00:19:14.460

Limitless Adviser: Right huge and those five to seven people are awesome to hang out with like you wouldn't be referring to them, they won't be refer you are not going to have ci relationships, where you.

139

00:19:15.060 --> 00:19:25.200

Limitless Adviser: cringe when you go to lunch yeah that is not the call so much to talk about right, because when you get together with tiffany if you're in tiffany's jam, or you had the best time ever.

140

00:19:26.250 --> 00:19:31.740

Limitless Adviser: To about lunch to collaborate and do this it's gonna be amazing and if you're not how's that gonna work out.

141

00:19:33.600 --> 00:19:38.340

Limitless Adviser: it's not gonna be very fun at all right, so does it work does it feel good.

142

00:19:39.240 --> 00:19:46.290

Limitless Adviser: tiffany is looking for the people who she can put through the system yeah that also feel good, because they are fit for all those factors we talked about yeah.

143

00:19:47.070 --> 00:19:52.740

Limitless Adviser: And so that building the seven figures, with a few good see you guys that's really exactly where it is right, you can take that break down.

144

00:19:53.100 --> 00:20:00.960

Limitless Adviser: They give you three a year you're close to two and a half of those and now we're in really good shape michael's model is you get clients here at.

145

00:20:01.260 --> 00:20:10.320

Limitless Adviser: \$7,000 at \$70,000 going to 330 percent margin that's 2100 over 20 years you're right \$44,000 because you spent some time.

146

00:20:10.590 --> 00:20:20.940

Limitless Adviser: being consistent with a handful of people yeah entrepreneurial line has a minimum of \$5,000 a quarter as a fee, so I bring in 20 clients for the year like that's solid like we're happy.

147

00:20:21.420 --> 00:20:30.570

Limitless Adviser: You know, and so it's just like I just think about that and i'm like that's awesome like how do I just really dive deep With these few people who are in front of my teams, or people all the time, how do we do that.

148

00:20:31.020 --> 00:20:33.060

Limitless Adviser: And the specialization is what God is there.

149

00:20:33.540 --> 00:20:45.030

Limitless Adviser: And lots and lots of Center of influence, where I go out and i'm like I really had the I just want you to like me more than anyone else, and if you pick me it's going to be great just trust me and it just never.

150

00:20:45.840 --> 00:20:57.600

Limitless Adviser: I mean people, just like me, but like I just like it wasn't the good business they didn't know how to point it and the moment we got clear on entrepreneurs Center of influence that I thought were a no shot all along the way, I worked.

151

00:20:58.050 --> 00:21:04.800

Limitless Adviser: I worked against their JP morgan's I worked against their wire houses, I worked against their generalists I just had a place.

152

00:21:05.340 --> 00:21:15.000

Limitless Adviser: And it was the place we want it to be right, because if an entrepreneur wants JP Morgan they don't want boutique destiny capital and entrepreneur aligned that's okay.

153

00:21:15.480 --> 00:21:26.070

Limitless Adviser: But they're going to have those business owners that come in, but like the boutique feeling that, like having a small trusted team that they can always count on and we were perfect for that were set up.

154

00:21:26.940 --> 00:21:32.220

Limitless Adviser: perfectly with the CEO is to get that business but that's the conversation it's an honest conversation.

155

00:21:32.970 --> 00:21:46.320

Limitless Adviser: Right, if you have a client that comes in, and they just want our fun investment JP Morgan is definitely business that i'm i'm not the place to send them, but if you want someone who wants a B and C i'm your person so you're doing that filtering again.

156

00:21:47.730 --> 00:21:58.140

Limitless Adviser: Alright, so let's talk about the relationship runway so all relationships have a runway marriage partnerships all of it so let's just walk through them quickly because whatever your seo campaign.

157

00:21:58.410 --> 00:22:06.330

Limitless Adviser: Is it's going to include these steps step one awareness, make the approach share the brand story create the next step you're establishing likability.

158

00:22:06.720 --> 00:22:15.660

Limitless Adviser: and creating in the ideal curiosity, how is this person different Why would actually want to take a meeting with TIM instead of all this other financial advisors what is Kathy got to say.

159

00:22:15.960 --> 00:22:22.260

Limitless Adviser: That might be a little bit different than what i've heard before right, so your job is to show up in a slightly different way, so that you get there, what.

160

00:22:24.150 --> 00:22:24.900

Limitless Adviser: begins with a.

161

00:22:26.220 --> 00:22:32.430

Limitless Adviser: Attention so you can get their attention because, once you can get their attention you can create awareness hey here's who I am.

162

00:22:32.730 --> 00:22:41.880

Limitless Adviser: This is what i'm about, if you like, that door with a window, please feel free to come up and then you get to education, to come up to the window like hey tiffany what's in your House just like.

163

00:22:42.930 --> 00:22:52.470

Limitless Adviser: happy to tell you so we're going to continue the connection we're going to educate the coi we're going to deliver do not ask deliver deliver deliver value step three engagement.

164

00:22:53.370 --> 00:23:05.100

Limitless Adviser: How do you positively engaged stephanie is going to walk you through that process like there's consistent you're adding value you're serving you're coming up with opportunities you're delivering consistently do you notice what is the key word was seo wise.

165

00:23:06.060 --> 00:23:20.070

Limitless Adviser: Consistent consistent right because everybody else is not and then partnering you cannot say you're taking the team approach and then do what everybody does and not take the team approach, because that makes you like everybody else.

166

00:23:21.150 --> 00:23:28.830

Limitless Adviser: So here's what I want you to think about this is a challenge to go back to your offices you're going to run a list of all your referrals for the last three years.

167

00:23:30.570 --> 00:23:38.280

Limitless Adviser: And on that list there's gonna be two categories people that are referred once clients or centers of influence and people that have referred, more than once.

168

00:23:39.480 --> 00:23:47.700

Limitless Adviser: A referral is the ultimate act of confidence is there anything anyone can do right don if one of your clients says yeah call diet is the ultimate act of trust.

169

00:23:48.750 --> 00:23:54.060

Limitless Adviser: So, why would somebody make the ultimate act of trust and then not do it again.

170

00:23:55.560 --> 00:23:59.280

Limitless Adviser: Do they not know anybody else in the entire planet with financial needs ever.

171

00:24:00.390 --> 00:24:09.330

Limitless Adviser: i'm not saying they're sending you a referral every six weeks, but over the span of three to five years they literally not run into another human being on the planet, that has a financial need.

172

00:24:10.200 --> 00:24:18.810

Limitless Adviser: know most of the time we haven't made it a memorable feel good enough experience that it creates value and

impact in their mind that they care about repeating it.

173

00:24:19.410 --> 00:24:30.930

Limitless Adviser: It just was like a non event so like what of so that's where partnering really works, because everybody says i'm awesome and great and then everybody's gone when it doesn't show up right away.

174

00:24:31.470 --> 00:24:39.900

Limitless Adviser: partnering is hey I have a client who has a need, maybe you even know the answer to that need but you're like hey can I spend an hour with you happy to pay for it, if I need to.

175

00:24:40.200 --> 00:24:48.750

Limitless Adviser: To just brainstorm this with you, I want to work it out, because when I sit across the client, I want to make sure that i've got the tax law really nailed think i'm pretty good but you're the account what did I just say.

176

00:24:50.610 --> 00:25:01.260

Limitless Adviser: you're as valuable as I am, and there is nothing that you do that just crushes those relationships more than inadvertently not making them your equal.

177

00:25:02.340 --> 00:25:10.740

Limitless Adviser: Their client it's the trust they're extending in you to their most precious commodity, they are like went to lunch, I thought it was great.

178

00:25:11.130 --> 00:25:20.160

Limitless Adviser: I get referral because you didn't you haven't told me that you're worth it, yet partnering is when tiffany shows up and does things without an ask.

179

00:25:21.090 --> 00:25:26.850

Limitless Adviser: When she caused that collaboration, when she follows up on those referrals in a really incredible way if you're not using the roadmap, you should be.

180

00:25:27.810 --> 00:25:34.200

Limitless Adviser: Problem Solving hey i've got a client who, if you have clients with any issues feel free to call us here, and I would be happy to brainstorm with you, if that comes up.

181

00:25:35.250 --> 00:25:41.370

Limitless Adviser: ID opportunities hey you know we just met with a client who had blah blah blah, and we realized that they probably have some accounting needs.

182

00:25:41.670 --> 00:25:48.360

Limitless Adviser: When we have clients in this kind of situation can we sit down pay love this, by the way, can we sit down and map out.

183

00:25:49.350 --> 00:25:59.160

Limitless Adviser: What kind of what that team approach would look like, so if I have a plan, and you know we're investing your assets when we're doing an eyelid or an fop either certain like we have to have the letters every year, we have to do this there's.

184

00:25:59.520 --> 00:26:07.140

Limitless Adviser: Like when I build a state with courses with you, like you just map out all the work that comes from there, like oh that

makes perfect sense to me how many of you've ever done that.

185

00:26:09.060 --> 00:26:13.080

Limitless Adviser: Right so that's the reciprocity of like hey where are the opportunities here.

186

00:26:13.470 --> 00:26:23.040

Limitless Adviser: When we have clients who are entrepreneurs and they have excess cash flow here the five or six strategies that we commonly use, and we take the team approach because it's actually important.

187

00:26:23.340 --> 00:26:26.700

Limitless Adviser: That because we're just saying it to our question that you were approached because we do things like.

188

00:26:27.060 --> 00:26:36.630

Limitless Adviser: eyelids and stock plans and democrats we need your expertise we need you on the team to sit down and breathe like what account is gonna be like oh yeah you're like everybody else who's done that.

189

00:26:37.680 --> 00:26:38.400

Limitless Adviser: Have you done that.

190

00:26:39.600 --> 00:26:43.380

Limitless Adviser: And you're the best and you're the best have you done that.

191

00:26:44.010 --> 00:26:54.750

Limitless Adviser: So that's what we're talking about is getting really intentional about what the build to that runway is and showing up intentionally in a systematic way to building that process and that campaign around.

192

00:26:55.170 --> 00:27:05.430

Limitless Adviser: The behavioral piece, this is what it takes to build trust and likeability and credibility, over time, so that we can convey that trust in the form of a client or for that's what you're asking for.

193

00:27:06.210 --> 00:27:12.150

Limitless Adviser: And the last step is referring, and when did you that your job is what you have one job, what is it.

194

00:27:13.680 --> 00:27:14.490

don't screw it up.

195

00:27:15.720 --> 00:27:23.460

Limitless Adviser: And by the way, i'm going to radically reshape your definition of don't screw it up, it is not to get client.

196

00:27:25.620 --> 00:27:35.130

Limitless Adviser: it's to get that the relationship is the far bigger, yet I don't give a flying flip if you get the first client.

197

00:27:35.850 --> 00:27:44.730

Limitless Adviser: What I do give a flying flip about is that this coi feel so good about the experience and where the responsibility for that know why is.

198

00:27:45.060 --> 00:27:48.060

Limitless Adviser: That they will totally go through that process with you again without hesitation.

199

00:27:48.720 --> 00:27:55.860

Limitless Adviser: If you and we don't have time to dig into it will talk a little bit about it, but that five step referral roadmap what you do want to cry or a client.

200

00:27:56.130 --> 00:28:05.520

Limitless Adviser: creates a referral has as much economic value as the referral do not discount it go watch that lesson we'll talk about it more, but when you get that right.

201

00:28:05.970 --> 00:28:16.800

Limitless Adviser: There like God she's so awesome no one's ever done that, when I mean they called me they said, we talked about why you refer the client, we want to understand what you were thinking you know the client.

202

00:28:17.130 --> 00:28:27.840

Limitless Adviser: way, but like tell me what you know what did you identify what was the reason what am I saying you're smart you're important you get it you're on my team, and when we're on the football field together.

203

00:28:29.040 --> 00:28:30.240

Limitless Adviser: What do we all want to do.

204

00:28:31.410 --> 00:28:42.150

Limitless Adviser: When, which means if I dropped the ball, what are you going to do, I get up, which means of client decides that you feel is too expensive, Melissa you are now utterly empowered to call that cpm say.

205

00:28:43.590 --> 00:28:52.050

Limitless Adviser: Jay I met with Jill this morning and her husband and they were lovely people and you're actually right like your your understanding of their situation their need for planning was absolutely spot on.

206

00:28:52.530 --> 00:28:58.050

Limitless Adviser: had a great meeting identified this issue this year should issue itself really good felt like we were all aligned.

207

00:28:58.890 --> 00:29:08.670

Limitless Adviser: That to the encoded the fee, they want to take some time to think about it, that usually means to me just on that stuff usually means to me that they're not quite sure if the value proposition is there.

208

00:29:09.300 --> 00:29:16.440

Limitless Adviser: You know our work, you know that our fees are the least expensive, you know that they're not the most expensive i'm totally seating here, but you know that they're fair for the value that we deliver.

209

00:29:17.010 --> 00:29:30.660

Limitless Adviser: So if Bob or Jane reach out to you or, if you have an opportunity to talk to them, I certainly I really want to reinforce the planning, whether it's with us or not, I think that you're absolutely spot on So what have I just said i'm awesome and Bob and Jane are cheap.

210

00:29:32.940 --> 00:29:39.810

Limitless Adviser: If Bob and Jane call coi first and say I met with tiffany she was really great but.

211  
00:29:41.040 --> 00:29:41.820  
This fees.

212  
00:29:43.410 --> 00:29:44.190  
Then who's to blame.

213  
00:29:45.360 --> 00:29:45.960  
who owns it.

214  
00:29:47.370 --> 00:29:48.120  
tiffany answer.

215  
00:29:49.230 --> 00:29:56.160  
Limitless Adviser: Right, he who tells us well he who does it is to play it's why I built the roadmap, if you own that process.

216  
00:29:56.520 --> 00:30:04.050  
Limitless Adviser: And you engage with them on the front end, you will help them understand the value proposition who deserve and win them Bob and Jane called the CPA which they will do.

217  
00:30:04.320 --> 00:30:13.170  
Limitless Adviser: and saying I met with tiffany and Jared and they were really nice, but the fee was 60 \$500 like is that a lot, and then, what is your CPA if you say if you've done it right.

218  
00:30:15.030 --> 00:30:22.710  
Limitless Adviser: Oh, my God, are you kidding only 60 \$500 pay that like literally that happens yeah oh my God, please write that check right now.

219  
00:30:24.090 --> 00:30:32.820  
Limitless Adviser: that's some team approach, but if you're doing anything less than that you're talking you're not taking the team approach, so I cannot and tiffany can tell you this from and.

220  
00:30:33.390 --> 00:30:40.470  
Limitless Adviser: that's what makes you different is taking the team approach you're just seeing it over the course of that relationship or online.

221  
00:30:41.550 --> 00:30:41.940  
alright.

222  
00:30:44.100 --> 00:30:58.530  
Limitless Adviser: Alright, so this somewhat reiterates exactly what you just saw and it's putting it into a process that I started with but create that clear intent, what are you going in for be intentional don't do the got the meeting i'm going to go have this coffee.

223  
00:30:59.940 --> 00:31:08.610  
Limitless Adviser: sit there get to know each other for 55 minutes in the last five minutes be like Oh, we should totally exchange business and then like yeah let's do another coffee and then go back and put in your CRM.

224

00:31:08.760 --> 00:31:16.020

Limitless Adviser: Six months out a reminder to go and see that guy again to go repeat that exact same thing 55 minutes of just hey what's.

225

00:31:16.350 --> 00:31:23.160

Limitless Adviser: That like we should totally do business together repeat repeat repeat that is not an intent it's not intentional it's not purposeful.

226

00:31:23.490 --> 00:31:29.880

Limitless Adviser: spend save your time so create the clear intent what's The purpose of that meeting is the purpose to get clear move up or move out.

227

00:31:30.120 --> 00:31:42.960

Limitless Adviser: Is there any red flags get to know fast get to yes fast in those first meetings really uncover like is their opportunity, so what I want you to see here at the bottom of that slide is to the top of tiffany spreadsheet that you first created.

228

00:31:43.230 --> 00:31:47.670

Limitless Adviser: When I was like hey the model she's like a little spreadsheet great we're going to share that with everybody.

229

00:31:48.360 --> 00:31:57.780

Limitless Adviser: hey how do I turn that idea into a repeatable process I do the lead do the contact and lead meaning I do it explore meeting I do a deep dive I do a commitment conversation.

230

00:31:58.170 --> 00:32:06.150

Limitless Adviser: And we set our goals it's a great coi goes into it like she's tracking it all the way through she's not winging it.

231

00:32:06.840 --> 00:32:17.850

Limitless Adviser: She can calculate lifetime value of those referrals you can calculate return on marketing, which means she can decide whether she wants to amp it up dampen it down expand it with other people.

232

00:32:18.480 --> 00:32:26.010

Limitless Adviser: So the problem with seo is is it's all relational and time based so we just show up in relation with time right where the results.

233

00:32:26.820 --> 00:32:30.750

Limitless Adviser: Well, the results are in the system and all good systems have regulators.

234

00:32:31.260 --> 00:32:36.150

Limitless Adviser: And that's what, in this case tiffany spreadsheet is it's a regulator let's make sure we do these things in a certain order.

235

00:32:36.360 --> 00:32:49.350

Limitless Adviser: there's transparent and accountable, which is why I actually think i've been successful and co marketing because my partners had access to that So if I went out and had another coffee and I did not bring in, and it was just consistently like well you're.

236

00:32:52.110 --> 00:33:04.410

Limitless Adviser: not happy with 417 people, we have no assets like here's a spreadsheet just hockey many not just to like show it

and, but this is really good for teams to write when my team wants to go and do Center of influence, marketing, I can see it.

237

00:33:04.680 --> 00:33:12.540

Limitless Adviser: I can see like great like Okay, it looks like you have for going into exploration and like you're at commitment, are you comfortable went into that meeting, what does that look like.

238

00:33:12.810 --> 00:33:22.350

Limitless Adviser: So even if you have teams and Center of influence marketing strong for them something as simple as that creates transparency and accountability to get it all the way through, and also, you have each step laid out.

239

00:33:23.250 --> 00:33:30.180

Limitless Adviser: So, and then the other pieces of that are building the connection and uncovering opportunities, so I will talk about it later, but um.

240

00:33:30.540 --> 00:33:34.890

Limitless Adviser: I used to do it in a series of three to four meetings i'm closer to two or three at this point on.

241

00:33:35.250 --> 00:33:42.030

Limitless Adviser: But i'm looking for like Do I really like this person to be values align values alignment is really important, because we look for that and clients.

242

00:33:42.390 --> 00:33:53.010

Limitless Adviser: And in culture, so it's something that we lead with I really uncover there and then opportunities as this person transactional to relational if they're transactional they're probably not my person.

243

00:33:53.340 --> 00:34:03.510

Limitless Adviser: They can be in a transactional job, but I want them to be a relational person does that make sense, so a State state planning could be transactional investment, the game.

244

00:34:04.770 --> 00:34:11.640

Limitless Adviser: they're about to go do a liquidity event, who knows about business owners that we're going to own another business and do it right their jobs to get that across the finish line.

245

00:34:11.910 --> 00:34:20.460

Limitless Adviser: but are they relational are they looking to build a relationship and be a trusted advisor through that process, or are they looking to get that business across the finish line, no matter what.

246

00:34:20.820 --> 00:34:29.640

Limitless Adviser: If they're looking to get that business across the finish line, no matter what they're not my person you're looking for you you're looking for you and other profession, yes, exactly and then.

247

00:34:30.690 --> 00:34:38.610

Limitless Adviser: dive deep start to understand where those opportunities exists at a deeper deeper level how you can really create that reciprocity, how you can really.

248

00:34:38.970 --> 00:34:47.640

Limitless Adviser: elevate that client experience so it's not only beneficial to the clients, but it's to them it's to us like there's so many winning opportunities and Center of influence marketing.

249

00:34:48.060 --> 00:34:55.500

Limitless Adviser: And then you just have to be super consistent with it hey just want to let you know we probably have a referral coming to you, I know the first one that we're going to collaborate on.

250

00:34:56.010 --> 00:35:02.760

Limitless Adviser: I want to let you know that we're going to do our very best to be ensure that it's the type of communication that you like the type of follow up that you're part of the meetings you'll be.

251

00:35:03.000 --> 00:35:10.890

Limitless Adviser: you'll know the process, but if any time like at any point along that like we're not communicating right or something doesn't feel right like i'm just a phone call away.

252

00:35:11.220 --> 00:35:22.140

Limitless Adviser: we're really looking to build a long term relationship with you, and while we feel we are going to be on good foot to do that, we might miss and we just want to have that feedback because right there that's intention.

253

00:35:22.890 --> 00:35:36.150

Limitless Adviser: You don't have to raise your hand but how many of you when you've had that relationship and you get that first referral have anything that resembles that conversation hey, by the way, we're about to embark on a journey together may or may not be perfect, how did I start this retreat.

254

00:35:37.710 --> 00:35:38.190

Limitless Adviser: Think about it.

255

00:35:39.330 --> 00:35:49.380

Limitless Adviser: I was like hey, by the way, should I go be perfect my intentions are good, are we all right, like please bear with me keep me Community keep me posted which tells you what.

256

00:35:50.850 --> 00:35:59.940

Limitless Adviser: They like i'm like I will tell you guys all about the curtain wall i'm in the middle of the curtain that's absolutely like sometimes you have a purpose some I didn't do it this time but but that's the intent is I care.

257

00:36:01.230 --> 00:36:07.920

Limitless Adviser: And that's what she's really good at So if you don't don't fake it, you have to like the person, on the other side of the table.

258

00:36:08.370 --> 00:36:21.330

Limitless Adviser: If you're going through the steps, because you think the steps are going to serve you and get you that five to seven people i'm going to call bullshit you were looking for people like you, who get you who love your style who you know, thank you, of course, use whatever.

259

00:36:22.470 --> 00:36:24.360

Limitless Adviser: You look people shoes and you know whether you like him or not.

260

00:36:26.310 --> 00:36:34.170

Limitless Adviser: right because we're like what did they say Adams wearing right really cool white sneakers with jeans and no socks, I was like Adam so preppy he said all.

261

00:36:34.980 --> 00:36:40.170

Limitless Adviser: Right my husband, I was like literally my husband will never wear this kind of sneakers he's totally advanced guys cool totally different way.

262

00:36:41.130 --> 00:36:50.610

Limitless Adviser: Right don's were in high tops what does that say typical typical like you're looking for your high tops you're looking for your loafers you're looking for your ferragamo like you're looking for your high heels.

263

00:36:51.540 --> 00:36:58.290

Limitless Adviser: Like that's how you're looking for we get caught all know you're just looking for that, and then you build a process to be like what kind of shoes, you were.

264

00:36:58.830 --> 00:37:06.240

Limitless Adviser: We were in same kind of shoots not literally pulmonary good friends very different shoes, I think you look great my husband wife.

265

00:37:07.050 --> 00:37:12.240

Limitless Adviser: Right mindset shift so that's the runway I want you to really get that because that counts.

266

00:37:12.960 --> 00:37:20.700

Limitless Adviser: You build a process around that runway you will put people through that runway and some of them will take off and some of them will jettison off the end and we just don't care.

267

00:37:21.210 --> 00:37:35.460

Limitless Adviser: that's the job is to figure out as quickly and efficiently as possible, who wants to engage the way you want to engage and the good ones desperately want to engage the way you want to engage they just don't know if you're actually the real deal.

268

00:37:36.510 --> 00:37:45.720

Limitless Adviser: Truly so that's your job, are we on the same page so separate yourself from the crowd by doing all the things we've talked about, you are not here to sell.

269

00:37:45.990 --> 00:37:55.860

Limitless Adviser: You are here to serve that does not mean do you send them 20 clients and they send you nothing in return, it means you start to understand the reciprocity of that relationship because Roi works both ways.

270

00:37:57.150 --> 00:37:59.520

Limitless Adviser: Does everybody get that all right.

271

00:38:00.870 --> 00:38:02.070

Limitless Adviser: don is mulling on that.

272

00:38:08.580 --> 00:38:09.990

let's say you're.

273

00:38:11.520 --> 00:38:16.890

30 referrals from five lakhs good price but.

274

00:38:19.590 --> 00:38:19.950

Is it.

275

00:38:22.410 --> 00:38:22.620

Not.

276

00:38:23.940 --> 00:38:25.260

Focusing on the ones.

277

00:38:39.570 --> 00:38:48.420

Limitless Adviser: So the basic models are couple of things and I want you to talk through how we did this is tiffany literally took everything I said in the session, just like this, then.

278

00:38:50.160 --> 00:38:55.560

Limitless Adviser: i'm going to put process around it so marketing operators are the greatest asset, because marketing is cool.

279

00:38:55.980 --> 00:39:02.160

Limitless Adviser: But if you can't systematized and operate it and create scaling just got a lot of talent wheeled around and tiffany's really good at operationalize.

280

00:39:02.910 --> 00:39:19.110

Limitless Adviser: The mark the mojo of marketing so one understand you'll remember this, it will be so so big so familiar, there are different kinds of people and you got to understand this there incubators their influentials and their pop ice.

281

00:39:20.520 --> 00:39:23.760

Limitless Adviser: it's a great question what is a popeye what's an incubator.

282

00:39:25.260 --> 00:39:34.260

Limitless Adviser: And incubating it's like an egg sitting on a nurturing it i'm showing up for the six steps of the process and then it's going to germinate in a chick.

283

00:39:34.950 --> 00:39:42.660

Limitless Adviser: or client for that I don't care what it is great you're investing your attention your time your energy your incubator.

284

00:39:43.440 --> 00:39:55.620

Limitless Adviser: influencer someone that's been through the incubation stage is already influential to your business a client that has referred the coi that has referred someone asked you'd be on a podcast they're influential and you better damn know it.

285

00:39:57.060 --> 00:40:04.860

Limitless Adviser: Right, because those are the people that can turn the needle up for you, just like that, and then you've got popeye's what's a popeye.

286

00:40:05.910 --> 00:40:06.720

Limitless Adviser: Who hears all that.

287

00:40:07.890 --> 00:40:12.630

Limitless Adviser: join me in their honesty josh Why did I buy the sailor man say all the time bill.

288

00:40:14.850 --> 00:40:28.290

Limitless Adviser: I am what I am and that's all that I am I am to see and learn men to do yeah they're never going to send you referral right it ain't gonna happen it doesn't matter how awesome you are in a paper bag stop wasting your time.

289

00:40:29.910 --> 00:40:34.770

Limitless Adviser: We go back to them for that fifth lunch, because they said they were going to send you referral, well then show me.

290

00:40:35.760 --> 00:40:40.500

Limitless Adviser: Because now that's the conversation hey you know what we've had a few lunches.

291

00:40:41.130 --> 00:40:44.700

Limitless Adviser: we've had a lot of conversation, but some clients, we can work with i've talked to you about some clients like.

292

00:40:44.970 --> 00:40:51.390

Limitless Adviser: Is this a relationship that you're really looking for like are you really looking for an advisor that you can count on to work with your retirees.

293

00:40:51.660 --> 00:40:56.850

Limitless Adviser: and your seniors that you know you know, and if you're not if you've got another advisor you feel like he's like it's okay.

294

00:40:57.690 --> 00:41:03.690

Limitless Adviser: right we don't I don't need to buy lunch all the time yeah you're you're going to find your version of that conversation, but like can you stand them that conviction.

295

00:41:04.260 --> 00:41:12.090

Limitless Adviser: yeah strong let's just be friends scripts that we have we have put on there, but it really is like friends without benefits yeah.

296

00:41:12.630 --> 00:41:16.170

Limitless Adviser: yeah it's not it's not you it's me me me um.

297

00:41:16.620 --> 00:41:25.140

Limitless Adviser: But you know when when steph talks about this like yeah but I preferred like 25 people they never referred back and the first thing is like okay pop I.

298

00:41:25.380 --> 00:41:33.030

Limitless Adviser: Like oh wait I can't like did you have a conversation and set expectations that this relationship was intended to have reciprocity.

299

00:41:33.300 --> 00:41:41.040

Limitless Adviser: If not don't roll them out yet exactly go back to them set those expectations, but when you have the expectations and you have the commitment.

300

00:41:41.250 --> 00:41:50.040

Limitless Adviser: it's very easy to say hey we agreed upon this there seems to be a real gap that exists and us being able to build this reciprocity and have this real exchange of value.

301

00:41:50.430 --> 00:41:55.920

Limitless Adviser: We both only have so much time to build our business and do this and it's not like you know I really want to value your time.

302

00:41:56.280 --> 00:42:06.810

Limitless Adviser: And you know we can't get here let's just be friends those types of conversations and it works out well because we were both really clear coming to the table that the intent of our relationship was to uplift and grow one another.

303

00:42:07.350 --> 00:42:14.070

Limitless Adviser: And let's be really clear about this, the only difference in the before and after is before that conversation you weren't getting clients from them.

304

00:42:14.550 --> 00:42:20.760

Limitless Adviser: And after that conversation not getting classroom, then the only difference is that you'd spend five minutes having the conversation and save yourself hours of time.

305

00:42:22.230 --> 00:42:30.780

Limitless Adviser: Like we're just so afraid that we don't even occur to us, we can have the conversation like that's The thing that blows my mind is that most of you are like wow it didn't even occur to me to have that conversation.

306

00:42:32.220 --> 00:42:38.070

Limitless Adviser: You were totally empowered to have that conversation like what is this relationship, going to be like when you date someone.

307

00:42:38.430 --> 00:42:49.110

Limitless Adviser: don't you ask them questions, what do you look for when a fun friends with benefits looking for a long like that's all happening all tiffany did was like take all of that, in a new window and say.

308

00:42:49.920 --> 00:42:55.290

Limitless Adviser: here's what I would like to get out of this relationship here's what i'm willing to contribute, which is part that most advisors miss.

309

00:42:55.770 --> 00:43:01.350

Limitless Adviser: And then she showed ups shows up with it consistently for some period of time and that's the runway.

310

00:43:01.980 --> 00:43:09.480

Limitless Adviser: You cannot roll them out until how many of you have had a staffing conversation with me and the conversation is always upper out and what is number one on upper out.

311

00:43:10.020 --> 00:43:22.380

Limitless Adviser: We own exactly where we are there's no history you hired them you change them you manage them rewarded them it's not their fault, from this moment forward, you are responsible get a set the standard you got to hold to the standard and then you get to be accountable standard same thing.

312

00:43:23.550 --> 00:43:34.680

Limitless Adviser: that's the reciprocity of Am I just going to have lunch with people or am I willing to create a space where I can have a conversation that says here's what I would like this exchange to be.

313

00:43:35.370 --> 00:43:40.020

Limitless Adviser: If that works for you great and if it doesn't that's okay.

314

00:43:40.860 --> 00:43:49.830

Limitless Adviser: Can we get there together, and then the how right, then you work out the how via your process and, by the way, it's a differentiator from the get go by coming in, without touching.

315

00:43:50.160 --> 00:43:57.180

Limitless Adviser: A lot of people like how we get nervous to go out and network and build those relationships, they are too they don't know how to do it.

316

00:43:57.600 --> 00:44:05.310

Limitless Adviser: And so I found the moment I legitimately went with agendas, because I was like okay like I really needed, the process of the system to be stronger.

317

00:44:05.970 --> 00:44:13.140

Limitless Adviser: Because I really wanted to get into comfort zone, which was just relationship and i'm like i'm not here for relationship i'm here for growth.

318

00:44:13.380 --> 00:44:24.240

Limitless Adviser: So I got to get uncomfortable send the agenda ahead of time here's what we're going to talk about like come prepared and just own that take the five minutes on the front end and then get to the agenda.

319

00:44:24.810 --> 00:44:31.020

Limitless Adviser: But what I realized is like it's it changed so fast, because that person was so grateful.

320

00:44:31.530 --> 00:44:35.880

Limitless Adviser: to finally have someone who was like hey we're going to make this actually work and here's how we're going to do it, and this not.

321

00:44:36.120 --> 00:44:46.080

Limitless Adviser: And nobody else that approached them like that and I found that to be very true with coi after coi after see ally, where I was like oh you just differentiate by bringing the process.

322

00:44:46.500 --> 00:45:00.870

Limitless Adviser: To this relationship just doesn't exist so ask yourself, when you ask someone to make a referral to you have you done the work of letting them know what to expect tiffany's talked about in the relationship in the communication, but what about the client.

323

00:45:02.400 --> 00:45:13.320

Limitless Adviser: Okay, I must get T shirts or you sitting down with them and saying hey you know what before we work together, I really want to understand what i'm going to bring to the table with your clients how we're going to work together.

324

00:45:13.890 --> 00:45:23.790

Limitless Adviser: And what that ultimately means would it be okay, if I stopped by the officer, you came over like walk you through kind of like how we actually do our first discovery meeting, what are the kinds and you're going to literally pull back the curtain.

325

00:45:24.090 --> 00:45:30.840

Limitless Adviser: because their brains, particularly CPS don't like not knowing just verify, which means your job is to what.

326

00:45:31.350 --> 00:45:34.950

Limitless Adviser: reveal the curtain you're like hey here's what happens by the Korean.

327

00:45:35.190 --> 00:45:40.710

Limitless Adviser: Talk about this i'm going to give them a simple one page plan there's so much complexity, but we're going to have a second meeting.

328

00:45:40.920 --> 00:45:50.160

Limitless Adviser: we're going to talk about what matters to them we're not going to talk about you know i'm not like it's not about their fee it's about the writer you're going to just lay and they're gonna be like and then what are you gonna say.

329

00:45:52.320 --> 00:45:55.320

Limitless Adviser: i'd really like to understand your process.

330

00:45:56.820 --> 00:46:10.050

Limitless Adviser: And you're going to pay attention right, you can ask questions right like okay like where's the space or processes like you know when I sit, like who should I be thinking about free free, so what you're saying is I validate you.

331

00:46:11.220 --> 00:46:17.310

Limitless Adviser: I acknowledge you part of the team it's a two way street right team approach, and if you do that consistently, you will find people.

332

00:46:17.670 --> 00:46:29.400

Limitless Adviser: In spite of all the stories and all of this, like in spite of all of that, you will find people who are like yes, thank you you're in a smoky financial advisor just come in here to get my clients like you're actually someone that I want to send my clients to.

333

00:46:30.900 --> 00:46:32.430

Limitless Adviser: I need how many of those people.

334

00:46:33.990 --> 00:46:39.330

Limitless Adviser: Can you do five to seven of those people that yes, can you also see why you can't do 50 of these.

335

00:46:39.780 --> 00:46:49.800

Limitless Adviser: Like you can't go deep on that and get that type of relationship or have that type of reciprocity, so you really need to uncover ensure do they have the pipeline of people.

336

00:46:50.040 --> 00:47:05.220

Limitless Adviser: Do they meet the values are they you know refer so it's important Asian get up or get out and then nurture it you can't have 50 of them so remember the vision voice vehicle model applies to all relationships, if you don't share vision can't your voice.

337

00:47:06.660 --> 00:47:07.590

Yes, what.

338

00:47:09.420 --> 00:47:12.900

What is your process where.

339

00:47:15.450 --> 00:47:19.680

The quiet, the first few that are already trained to.

340

00:47:22.800 --> 00:47:23.430

flow where.

341

00:47:26.100 --> 00:47:32.520

Thank you, what time do before I thought, why do without baby i'll see you right.

342

00:47:34.860 --> 00:47:43.770

But the referral goes to the workload that the client already know right sure he built the person, but, but she does not fill.

343

00:47:46.230 --> 00:47:53.670

Limitless Adviser: So, so do you guys did everybody hear the question so don's question was what if I get a client referral, which is another form of coi, by the way.

344

00:47:54.090 --> 00:48:02.640

Limitless Adviser: and based on his process where to get that referral and my processes, you know send an email that says Thank you so much, Nice to meet you please do a B and C.

345

00:48:03.060 --> 00:48:11.490

Limitless Adviser: So that we can D and then a B and C don't happen so here's I love your input on this, but here's my input on that you don't have a relationship with the referral yet.

346

00:48:12.360 --> 00:48:19.590

Limitless Adviser: So if you have a podcast that drives to your website and your online sales funnel that says, please do a B and C, we have a relationship.

347

00:48:20.430 --> 00:48:28.920

Limitless Adviser: Based on the podcast I have, I have filtered you already and discerned that you are worthy of my phone call or my website visit, but if it's just a referral.

348

00:48:30.750 --> 00:48:35.340

Limitless Adviser: Even from a CPA and the first thing you get is a B or C what's missing.

349

00:48:37.980 --> 00:48:38.610

Limitless Adviser: The connection.

350

00:48:39.720 --> 00:48:44.070

Limitless Adviser: Right, so they have a connection to the referral, whatever that person said, is what they're buying into.

351

00:48:44.460 --> 00:48:52.710

Limitless Adviser: What you want to control before that process is what they're buying into that's where a 10 or 15 minute phone call sometimes a 20 minute phone call.

352

00:48:52.950 --> 00:49:01.950

Limitless Adviser: Is the most powerful thing because remember standardizing specialized, but when someone says donna's the guy I want you to talk to him and the first thing I get is.

353

00:49:02.220 --> 00:49:08.760

Limitless Adviser: there's no podcast there's no relationship there's no blog that's the key with CEOs or clients got to have a relationship, you need permission.

354

00:49:09.210 --> 00:49:16.050

Limitless Adviser: And you're saying, please follow a process before we have a relationship so if they have a compelling financial need.

355

00:49:16.590 --> 00:49:23.100

Limitless Adviser: Right, maybe, but if you just take that step in the process when it's a personal referral, and you have the website or other things, to educate.

356

00:49:23.370 --> 00:49:28.410

Limitless Adviser: To have that 15 minute conversation to say oh i'm really appreciate your customer trust and confidence.

357

00:49:28.680 --> 00:49:39.180

Limitless Adviser: And then you have that conversation has been 10 or 15 minutes on the phone and you say hey really appreciate the Jane reached out it sounds like you have some issues i'd be happy to spend some time with you, you have that 10 or 1520 minute.

358

00:49:39.480 --> 00:49:45.390

Limitless Adviser: 30 minute conversation we've all established at the time, is probably worth it, if it's a client, which probably is if it's a referral from Google.

359

00:49:45.720 --> 00:49:51.900

Limitless Adviser: Because that's his niche and then you spend that time with that person, and if they proceed A, B and C, are no longer a problem.

360

00:49:52.800 --> 00:50:02.640

Limitless Adviser: That is only a problem for you, if you get so many of those calls that it's overwhelming from a time perspective I just don't think that's the issue at this point so you might want to just inject a 15 minute.

361

00:50:03.120 --> 00:50:16.950

Limitless Adviser: learn more conversation before you systematized but you don't have you have the referral, but you don't have the relationship and that counts for a lot, but when you're going into an online sales whether it's email or not it's not personal.

362

00:50:18.240 --> 00:50:26.070

Limitless Adviser: So you want to create that connection that says Is this something you really want to learn more about yes it is okay, in order to add that value.

363

00:50:26.370 --> 00:50:35.940

Limitless Adviser: Now I need you hey would you like to understand the answers to your most pressing questions Oh, those are very combinations of Google, we can sit down together, then we'll be able to talk through your specific so would you like to schedule a meeting.

364

00:50:40.170 --> 00:50:43.260

Limitless Adviser: Yes, no with the potential client yeah that's a referral.

365

00:50:43.530 --> 00:50:51.780

Limitless Adviser: you're going to follow up the referral source separately, which is what we talked about them a roadmap, which is you're always going to call the referral source, whether it's a client or Center of influence every single time.

366

00:50:52.560 --> 00:51:01.590

Limitless Adviser: I like the am PM rule, which is, if you do the call the communication, the morning you follow up with referral source by the afternoon I think tiffany has a 24 hour rule, which is just fine yeah.

367

00:51:02.400 --> 00:51:11.460

Limitless Adviser: Which is he who tells us well he who doesn't is to play so you always want to be the one that says hey, thank you for your trust and confidence, I really appreciate it.

368

00:51:11.700 --> 00:51:14.760

Limitless Adviser: here's what you can expect if it's a Center venture it's a client it's different.

369

00:51:15.150 --> 00:51:19.590

Limitless Adviser: client you can't reveal a lot right there's just confidentiality, they were just say we're going to meet with them.

370

00:51:19.860 --> 00:51:25.260

Limitless Adviser: really appreciate you thinking of US you're going to do the follow up process rates three steps with clients because there's only so much you can do.

371

00:51:26.100 --> 00:51:31.920

Limitless Adviser: That that's the process, then the step is so you're you're nurturing you're reinforcing the referral.

372

00:51:32.550 --> 00:51:37.470

Limitless Adviser: Whether it's a client or influence remember when I said in the beginning, I don't care if they say yes or no, why.

373

00:51:38.130 --> 00:51:47.100

Limitless Adviser: The referral is the money it's the biggest act, they can make if that person says no, and you don't value the referral, you will never get another referral.

374

00:51:47.640 --> 00:51:55.110

Limitless Adviser: You were too expensive, or to this or to that, but if you call the coi and you say hey, this is what happened and blah blah blah and here's how I want to help you reframe it.

375

00:51:57.210 --> 00:52:10.620

Limitless Adviser: Then it's relationship based, and even though the client said no, from the client and get it, the ball still gets to keep moving down the field we're just in the first quarter, which is entirely different than you blew it and kicking you off the team.

376

00:52:11.760 --> 00:52:27.030

Limitless Adviser: So the coi piece for clients is you can only do so much with clients you just want to have the berries and the thank yous and you want to build referrals into your marketing machine like, how do you see the idea of referrals really consistently in a very dignified way.

377

00:52:28.320 --> 00:52:34.200

Limitless Adviser: One of these days, we have to do a session on client advisory boards if, most of them are those are really great so let's talk about the actual.

378

00:52:34.650 --> 00:52:45.570

Limitless Adviser: relationship building process one you're going to build a ci focus list don your seo is your clients right who your top 10 or 20 clients, if you don't have a list.

379

00:52:46.260 --> 00:52:52.410

Limitless Adviser: build one you can buy one from the a CPA there's like every you know asset protection attorney estate planning attorney.

380

00:52:52.680 --> 00:52:58.980

Limitless Adviser: there's lots of different techniques and a really good job of identifying different kinds of CEOs yeah I have a CEO of an APP company.

381

00:52:59.610 --> 00:53:08.790

Limitless Adviser: And she works with business owners and entrepreneurs that provides Apps to whatever services or whatever they're doing and she's an incredible refer, and what kind of what she found most management.

382

00:53:10.410 --> 00:53:12.000

Limitless Adviser: kind of founders create ups.

383

00:53:13.020 --> 00:53:16.680

Limitless Adviser: Growth oriented founders create an upgrade growth oriented founders have any.

384

00:53:18.480 --> 00:53:20.010

Limitless Adviser: heard that.

385

00:53:21.030 --> 00:53:25.290

Limitless Adviser: That was that person going to like embed a financial planning conversation to there and no.

386

00:53:25.740 --> 00:53:32.520

Limitless Adviser: But are there going to be opportunities for someone's like we're about to get bought out I just got to get this APP done oh my God hey yes or something like that.

387

00:53:33.000 --> 00:53:39.630

Limitless Adviser: yeah kind of claim is awesome yeah okay now there's her of influences like she runs a like community.

388

00:53:40.050 --> 00:53:47.820

Limitless Adviser: Like a women's Community membership and it's not a nonprofit and for profit, but like you know just a community of women that get together over attacking and.

389

00:53:48.210 --> 00:53:56.490

Limitless Adviser: m&a and she has the entire list has all the people, she goes into sponsors and like she opened doors like if your clients are went on CPA not an attorney.

390

00:53:56.760 --> 00:54:09.150

Limitless Adviser: You, why do you not have a list of every woman organization in the country and the name of the CEO and membership director of the conferences that they have and the newsletters that they send out and the journals that you can sponsor like where's all that.

391

00:54:10.710 --> 00:54:19.680

Limitless Adviser: Right so seo is one you want to build your list to you want to take your approach so we've talked about some of those ideas, but your job is to be different.

392

00:54:20.460 --> 00:54:30.210

Limitless Adviser: hey you know what my current clients new clients that I have they asked me for good referrals right i've got a good few but i'm always looking for good ones, you know i'm really looking for people in the area who specialize in.

393

00:54:30.900 --> 00:54:37.350

Limitless Adviser: Right, bringing the tech founders working so your job is you're doing the same thing you do with clients, which is you're surfing the web.

394

00:54:38.010 --> 00:54:48.480

Limitless Adviser: Where the world looking for the things that fit hey i'm looking for a few people that i've got to refer to you do, you have some questions like all those questions in the models there's loads of tiffany's all samples in the lessons.

395

00:54:48.930 --> 00:55:01.380

Limitless Adviser: But don't you like the approaches you've got to have one and it's not been paying for lunch so it's really about how you're going to show up differently so 2.5 is modified that approach for existing relationships, some of you have seen wise.

396

00:55:02.430 --> 00:55:10.200

Limitless Adviser: This is new going to go back to them and you'd be like hey i've made some changes to my practice and i'd like to pay for an hour of your time, you know if you that really i'd like to sit down.

397

00:55:10.470 --> 00:55:16.050

Limitless Adviser: And really talk about what those changes are, how we can do a closer better job of collaborating i've got some clients.

398

00:55:16.260 --> 00:55:23.010

Limitless Adviser: who have needs and i'd like to really better understand, let the tax and accounting work related you know we're working with a lot more entrepreneurs are a lot more widows.

399

00:55:23.310 --> 00:55:33.660

Limitless Adviser: For seniors and I just want to get really clear on what this tax issues are and make sure that i've got it really nailed down, so that when I need to make a referral I know exactly you know who to send him to quick yes they're going to have that meeting with you.

400

00:55:34.680 --> 00:55:42.180

Limitless Adviser: Now, your job is to make sure you've done the diligence so that it's worth it to that point, but then you're going to

be intentional so here's some good examples like tiffany took it.

401

00:55:42.720 --> 00:55:50.880

Limitless Adviser: And built out the coi profile what so talk about where some of my stuff looks like it's from like early 2000s like this another word or excel.

402

00:55:51.450 --> 00:55:53.910

Limitless Adviser: This is now in tech or it's going to be in tech.

403

00:55:54.630 --> 00:56:04.080

Limitless Adviser: But it's that simple i'm like okay like I need to remember stuff and I needed to be clear and I just need one page, and here it is like what do I need to know about them what super exciting to them were.

404

00:56:04.590 --> 00:56:06.000

Limitless Adviser: different ways that I could show up.

405

00:56:06.480 --> 00:56:18.690

Limitless Adviser: What do I need to remember and not repeat next meeting, like all those fun, but if someone says to you hey my personal challenges like hey yeah I have a really hard time managing my time to when we talk about those monthly drips talk about like what are you going to drip on.

406

00:56:19.260 --> 00:56:23.310

Limitless Adviser: Like what she's got see her her serum is going to tell her here there here's the pain points.

407

00:56:23.790 --> 00:56:30.810

Limitless Adviser: But the spreadsheet or the CRM that's just a different way to scale like, how do you capture the key information and it's literally a word Doc.

408

00:56:31.110 --> 00:56:39.750

Limitless Adviser: With their name across the top where you're looking at that, like if that's where you're at and that's great tech a starting point she's literally she's like oh my God i'm so embarrassed by virtue of my.

409

00:56:41.130 --> 00:56:50.700

Limitless Adviser: Money like are you getting So yes, you get right you're honing your craft you get more sophisticated but I don't want you to feel like this is a big impossible thing it's pick some people.

410

00:56:51.030 --> 00:57:03.210

Limitless Adviser: put them in a campaign which we'll talk about and then follow the steps so we've got the logs we've got the messaging the scripts in the dialogue, you can tweak that but I really want to get you like what's that process, so one you're going to have a meeting.

411

00:57:03.660 --> 00:57:07.260

Limitless Adviser: we've talked about that, but that whole the whole point of that meeting is what.

412

00:57:09.840 --> 00:57:17.100

Limitless Adviser: level setting is reframing like here's the common language here's like here's here's my rosetta stone.

413

00:57:18.930 --> 00:57:27.030

Limitless Adviser: Do we speak the same language, and if we don't it's okay like that's the whole point of that meeting the set, then the next step is to tell your story.

414

00:57:28.740 --> 00:57:35.610

Limitless Adviser: yeah that's exactly the setting the expectation is so fun and Center of influence, marketing, I mean I just love it one connectors connect so I connect.

415

00:57:35.970 --> 00:57:43.410

Limitless Adviser: But it's like hey we get to we get to create this most beautiful experience, not only do we get to elevate our client experience to put a full team around them.

416

00:57:43.650 --> 00:57:51.420

Limitless Adviser: And to do something super special for them, but I get to uplift you and you get to uplift me we get to impact three different places all at once, by just making this work.

417

00:57:51.660 --> 00:57:59.010

Limitless Adviser: That story resonates really, really well with people it's like my attention is clear and then it's like tell me more about you, so we can dive deep and really do this well.

418

00:57:59.490 --> 00:58:08.580

Limitless Adviser: And then they asked back nobody like people like to talk about themselves, I like to go there first, but then they never did like they're never just like okay well that's great.

419

00:58:09.540 --> 00:58:16.620

Limitless Adviser: And if they are red flag they're out yeah cool let's just be friends move on, but the next ask what's yours tell me your story.

420

00:58:18.150 --> 00:58:18.810

Limitless Adviser: Go ahead and listen.

421

00:58:22.020 --> 00:58:22.440

Limitless Adviser: yeah.

422

00:58:24.780 --> 00:58:25.230

Correct.

423

00:58:33.030 --> 00:58:41.010

Limitless Adviser: that's a really good question um actually when Stephen I first started, I was like really not at my parents, they bring in all this business is the hardest thing to do and he's not closing.

424

00:58:42.840 --> 00:58:52.530

Limitless Adviser: And then she's like So how are you setting them up because you're out there selling tiffany and then they're coming in and getting somebody else, and I was like i'm like i'm totally setting them up for failure.

425

00:58:52.860 --> 00:59:04.170

Limitless Adviser: So I really had to work at that one and really I set it up it's like i'm you know i'm out here to do the connection to ensure the client experience and everything that you receive are all that our clients received as.

426

00:59:04.920 --> 00:59:14.820

Limitless Adviser: i'm trying to think of all the words but like i'm essentially in like i'm no longer client facing my job is to ensure that people's minds that are open to what we do that we deliver consistently on that.

427

00:59:15.090 --> 00:59:19.710

Limitless Adviser: I go out and professional partners to ensure that not only we can add value to you, but.

428

00:59:20.070 --> 00:59:26.220

Limitless Adviser: You can also add value back to us and the client experience is really great and then, when the clients come in it's a very similar conversation right.

429

00:59:26.550 --> 00:59:34.140

Limitless Adviser: i'm here if you need me at all at any point, but as a Center of influence once they're in client collaboration i'm not in that.

430

00:59:34.770 --> 00:59:42.510

Limitless Adviser: So I let them know you'll be working with our team, I want you to build a relationship with them to you'll be building it over here, but when it comes to strategies work are the opportunities are, how we can expand.

431

00:59:42.810 --> 00:59:51.240

Limitless Adviser: i'm here for you until my advisors are ready to take that relationship and start nurturing it for growth, otherwise our advisors are nurturing it for client experience.

432

00:59:51.600 --> 00:59:59.280

Limitless Adviser: Does that make sense, so i'm really just putting myself in the position of i'm here to explore how we can get the most out of this situation and and then.

433

00:59:59.910 --> 01:00:11.790

Limitless Adviser: My team is here to do the amazing work and in all other businesses that's generally how it works right, you have the marketing engine, you have the onboarding engine and then you have the service and the maintenance engine.

434

01:00:12.270 --> 01:00:15.000

Limitless Adviser: And they're not usually the same person as you scale yeah.

435

01:00:15.210 --> 01:00:25.650

Limitless Adviser: And so that's the transition is, if you don't set the expectation for the experience they're going to have they're going to set themselves yeah so you can say hey you know what i'm Adam, I think that, especially when you're teaching a session.

436

01:00:25.890 --> 01:00:31.650

Limitless Adviser: Right he's got a service advisor so he says, all the time you come for me and you stay for us yeah we're building a team.

437

01:00:32.070 --> 01:00:40.470

Limitless Adviser: great team of experts, my job is sit with you look at the strategy that so your job, always which you might recognize from the build a brand boot camp is to define your role.

438

01:00:41.040 --> 01:00:48.210

Limitless Adviser: share your approach and communicate the value yeah and we also have you know I mean you just get your key messages so similar to like the wheels.

439

01:00:48.570 --> 01:00:53.760

Limitless Adviser: Just like yeah we you know, the way we define fiduciary means that you know financial plans are never just dependent on one.

440

01:00:54.000 --> 01:00:57.150

Limitless Adviser: Upon one person we really feel like that's a risk that nobody should take.

441

01:00:57.360 --> 01:01:07.950

Limitless Adviser: And that we should have a team that's fully servicing them and we just we go with those stories that are like Oh, like, I have a team, because that is in the best interest of my relationship and the opportunities and clients and all the.

442

01:01:08.940 --> 01:01:14.880

Limitless Adviser: race, you tell that story so step six is ongoing contact so you're going to identify people that you want to nurture.

443

01:01:15.630 --> 01:01:23.520

Limitless Adviser: you're going to build a campaign around that am I going to drip so ideally what you're going to do is you're going to have a list of more people that you're going to work with.

444

01:01:24.150 --> 01:01:26.250

Limitless Adviser: But you're going to drop campaign on them.

445

01:01:26.700 --> 01:01:34.830

Limitless Adviser: When I mean by drop campaign is you're gonna have to remember the birthday cake for service models are the wedding cake standard specialized and personal same thing standard is.

446

01:01:35.130 --> 01:01:43.200

Limitless Adviser: once a month we drop a thought of you right you've got your postage you write them on Sunday night you watch the football game, or whatever it is, get them off to your assistant.

447

01:01:43.440 --> 01:01:53.280

Limitless Adviser: here's the list boom boom boom go or it's an email it's great you mass blaster like you can really make that especially stuff look personal and it consists of that's the schedule that you want to build out.

448

01:01:53.610 --> 01:02:03.240

Limitless Adviser: And then you're 30%, and this is where tiffany got really good is that's the one on one campaign so you can't work with 100 people, so will literally take depending on your.

449

01:02:03.450 --> 01:02:08.100

Limitless Adviser: who they are, and your time and your size and say okay we're going to focus on 10 people this quarter.

450

01:02:08.850 --> 01:02:14.460

Limitless Adviser: So we're going to have an up campaign for the quarter we're going to get all the standard stuff but now we're in special mode they're going to get.

451

01:02:14.700 --> 01:02:26.730

Limitless Adviser: A lunch they're going to get a drip every single month they're going to get to check ins and we're going to find one plan opportunity in our client base you're gonna have some person summaries call Kevin hey Kevin, what do you think about this.

452

01:02:27.270 --> 01:02:33.510

Limitless Adviser: You can always find one, and if you do that for 90 days or six months, however, you define that campaign.

453

01:02:34.200 --> 01:02:38.790

Limitless Adviser: If they have not moved up with the referral they move out back down to the standard list.

454

01:02:39.660 --> 01:02:46.950

Limitless Adviser: Like that energy and effort just maybe over three years, but that's not what we're investing like are they there do they have the value of we had the conversation.

455

01:02:47.220 --> 01:02:54.300

Limitless Adviser: we've done the follow up to demonstrate our proof of concept and your credibility and if, after many days I have not found someone they're not looking.

456

01:02:55.230 --> 01:03:04.470

Limitless Adviser: Because i've done all this stuff so i'll put them in the mailing list will nurture on them and drip on them, and maybe six months from now, or six years from now, that a phone call about that \$6 million client and that does happen.

457

01:03:05.700 --> 01:03:14.880

Limitless Adviser: But you can afford that because it scale special is where you continue to show up hey I met with these 10 people, one of them actually moved into the incubator campaign.

458

01:03:15.180 --> 01:03:21.000

Limitless Adviser: So they moved from mailing list nurture to incubator because they're actually interested in talking to you are tiffany.

459

01:03:21.600 --> 01:03:28.350

Limitless Adviser: Great so once they're in that incubator campaign that's where you focus your attention, I like quarters, because it's easy to track.

460

01:03:29.280 --> 01:03:41.400

Limitless Adviser: Right it's who am I paying attention to extra special have a process for that standardized 70% of it, you do a lot more touches show up and all the ways, you can we talk about, and if you do that.

461

01:03:41.940 --> 01:03:49.590

Limitless Adviser: consistently you'll you'll know who the opportunities are and where they show up and then what you get to do is be the invaluable partner.

462

01:03:50.490 --> 01:03:57.540

Limitless Adviser: You get to surprise the light and support because that's your job, and you get one back then you get the benefits reciprocity.

463

01:03:58.050 --> 01:04:05.610

Limitless Adviser: So if you don't create reciprocity, if you don't create a partnership, if you don't create the expectation and

experience can't just say it.

464

01:04:06.000 --> 01:04:16.110

Limitless Adviser: You notice how everything we're talking about is seating it tell me, you know tell me a little bit more about why you thought John and Jane should be sitting down with us today, like you know, obviously, you know them and yes.

465

01:04:16.470 --> 01:04:24.930

Limitless Adviser: Oh right yeah that taxi totally right like you're constantly saying you're on the team, you get the Jersey so that's what I want you to think about like are you, giving them the Jersey.

466

01:04:26.040 --> 01:04:29.100

Limitless Adviser: Jersey, because what happens is second they put the Jersey on.

467

01:04:31.320 --> 01:04:41.940

Limitless Adviser: There on the team and, what is the team want to do it all down the field, and that means they want to get the client down the field, they want to find people, and when you have those push backs and shows up it's good Tiffany's amazing whatever the features pay.

468

01:04:43.530 --> 01:04:53.430

Limitless Adviser: or pay notice probably not the right plan for you I've worked with Jack and Jane I'm really hoping, but the truth is like Jack just can't Thank you so much, as opposed to how did you screw this up.

469

01:04:54.480 --> 01:05:00.270

Limitless Adviser: So different and experience, but as you're putting them in New Jersey mutual clients.

470

01:05:00.990 --> 01:05:06.960

Limitless Adviser: prospect is become on this is your slide go for it yeah I mean this is, I mean we're going to try to quickly go through this but.

471

01:05:07.260 --> 01:05:12.270

Limitless Adviser: process became a client COI update remember again setting up and just being consistent.

472

01:05:12.540 --> 01:05:20.430

Limitless Adviser: I'm going to update and if they all of our CEOs hey just wanted to let you know we just had our third meeting it looks really great they're about to sign the contract contract and engaged in the full services.

473

01:05:20.790 --> 01:05:29.880

Limitless Adviser: And this is, you know we see a tax piece coming up here legal piece coming up here and then a situation of here, whoever sends it right and and if it's just somebody like I'm.

474

01:05:31.380 --> 01:05:39.300

Limitless Adviser: The CEO of the APP like I just let her know that they became a client like that's a win like there's nothing more this needed there because it's not a collaborative.

475

01:05:39.630 --> 01:05:56.190

Limitless Adviser: relationship from there on now and and then the prospect has not become a client, so this is just a matter of letting them know why or why not again just being open, you should have the relationship at this point, do you like we missed that or the COI.

476

01:05:57.210 --> 01:06:01.860

Limitless Adviser: wasn't wasn't qualified right i'm so glad that you thought of me for this and you're right.

477

01:06:02.310 --> 01:06:06.090

Limitless Adviser: They really needed what you need when, in that case we refer them to a trusted advisor.

478

01:06:06.420 --> 01:06:13.320

Limitless Adviser: know your seo wise because they have other if they have other advisors, I have CEOs that have other advisors I won't refer them out i'll say hey.

479

01:06:13.680 --> 01:06:20.550

Limitless Adviser: just wanted to check in with you, I of course I have other that advisors it'll do really, really great work after what we've uncovered here their deeds.

480

01:06:20.820 --> 01:06:27.600

Limitless Adviser: Do you have an advisor that you want to refer this to otherwise i'll go ahead and take this and make sure that it gets full circle works, really, really well.

481

01:06:27.870 --> 01:06:41.880

Limitless Adviser: But the point is is you can't just be you just you can't take that referral and just let it that beat with the coi you have to let them know you have to let them know along the way, and then you have to let them know the results if you would want to know they have to know yeah.

482

01:06:42.900 --> 01:06:51.690

Limitless Adviser: Right so as soon as you know, something the decision the maybe the issue oh Bob and Jane okay you just call up and say hey you know I came up origins came up.

483

01:06:52.230 --> 01:07:00.750

Limitless Adviser: You know nothing, maybe to act on now, but I just want to put it on your radar there might be some things we're going to want to talk through them right me some tax strategies like you're just constantly collaborative.

484

01:07:01.020 --> 01:07:04.650

Limitless Adviser: Because that's what gets it to the next level so they're going to start to identify.

485

01:07:04.950 --> 01:07:13.950

Limitless Adviser: ideal clients tiffany literally sit down with them and says let's identify who the ideal clients aren't, what are the resources, how can I help you how can you help us hey can you like these tax strategies.

486

01:07:14.430 --> 01:07:17.640

Limitless Adviser: or something yeah it's totally it's just resourceful.

487

01:07:18.150 --> 01:07:22.920

Limitless Adviser: Pictures bigger don't wait yeah I mean our CEO is like love what they do, they like so.

488

01:07:23.130 --> 01:07:30.510

Limitless Adviser: They love talking about it and, like if i'm engaging and saying hey I really want to learn more about this, so that we can show up really well or let's just bring you to the table, what do you think about doing.

489

01:07:30.840 --> 01:07:37.350

Limitless Adviser: a phone call or whatever it is they're happy to do it, or like hey I have this event coming up oh there's this.

490

01:07:37.860 --> 01:07:44.130

Limitless Adviser: there's this opportunity I have to get on stage I really thought that it would be better if we did it together, would you be open to that like whatever that looks like.

491

01:07:44.370 --> 01:07:48.690

Limitless Adviser: Have a client Advisory Board is just going to be some of our top clients, but I really value as a.

492

01:07:49.050 --> 01:07:55.440

Limitless Adviser: Center of influence, and I think would be really beneficial to have you there and see what we do with our clients at an even deeper level, while also.

493

01:07:56.070 --> 01:08:03.150

Limitless Adviser: Having another professional partner there who can dive deep with us like super awesome and so just thinking about the fact that, like.

494

01:08:04.050 --> 01:08:12.030

Limitless Adviser: In deepening the relationship it doesn't always stay at a client referral level you're deepening it when you're like uncovering what are your goals for the year oh.

495

01:08:12.180 --> 01:08:20.700

Limitless Adviser: you're going to sit on a board you've never sat on the board hey I know these three board members that can be over here and i'm happy to make introductions so that you feel really confident going to sit in that seat super big.

496

01:08:22.170 --> 01:08:27.180

Limitless Adviser: But you cannot don't like wow, and that is about it's no different right than the client who comes in and.

497

01:08:27.540 --> 01:08:36.000

Limitless Adviser: Because you asked for the agenda in advance and says hey mom in the home, and you can do about research and sit down and visible herbie tell that story it's while because she had the space to create the wow.

498

01:08:36.480 --> 01:08:46.350

Limitless Adviser: She had the space to create the wow because he has a system to specialize her attention so that she knows, she gets a consistent result that she has the time to show up and create the wow Melissa.

499

01:09:00.600 --> 01:09:05.700

Limitless Adviser: podcaster huge one and, by the way, if you don't have one, do you know someone that has one that you can open that seat do that all the time.

500

01:09:06.030 --> 01:09:09.090

Limitless Adviser: Like, how do you have any stories really cool can I share it over here.

501

01:09:09.360 --> 01:09:16.500

Limitless Adviser: You have a newsletter right, you can be like hey do you have a tax strategy or a tip that we could share on our client

newsletter hey i'm writing an email to my clients.

502

01:09:16.740 --> 01:09:23.220

Limitless Adviser: hey i'm being interviewed I was interviewed for an art I someone called out and said hey with barons i'd like to interview, and what did I do in that interview.

503

01:09:25.050 --> 01:09:36.180

Limitless Adviser: open the door open door for tiffany and it was again we actually use, we have a lot of clients do this and we've done a lot of work computers actually have the client has done an incredible job of this here's how they've done it, what was the next logical question.

504

01:09:37.260 --> 01:09:38.610

Limitless Adviser: Who was that firm, could I talked to them.

505

01:09:41.730 --> 01:09:47.220

Limitless Adviser: And then they talked to tiffany and he was like oh my God, this is so amazing co write another article about your firm and the book.

506

01:09:48.480 --> 01:09:52.230

Limitless Adviser: In barron's about their approach, yes, thank you very much.

507

01:09:53.580 --> 01:10:02.550

Limitless Adviser: But what did I have the ability to do in that time and space be intentional because they knew exactly what I was doing when I plucked her and influence absolutely what I was doing.

508

01:10:03.720 --> 01:10:09.630

Limitless Adviser: So that's your job when you're sitting across from a client, you should be constantly discerning where's the opportunity in this meeting.

509

01:10:09.840 --> 01:10:17.700

Limitless Adviser: With the coi with that resource, with a referral so that, because you have to be present, which means you have to have mind space which Miller shit has to be handled.

510

01:10:18.270 --> 01:10:25.470

Limitless Adviser: But what it is you get to do this, like wow wow well you create the wow there's no more work.

511

01:10:25.830 --> 01:10:31.830

Limitless Adviser: And we're building brand and we're building community and we're building client experience or improving outcomes I love Center.

512

01:10:32.190 --> 01:10:39.120

Limitless Adviser: So here's the process tiffany i'll walk you through it, which is right, this is your funnel but it's not your online sales funnel that you're.

513

01:10:40.110 --> 01:10:53.040

Limitless Adviser: Seeing my funnel yeah this is how it works, so if you have existing coi but you haven't set expectations put them at the top of the list, otherwise go to look to get 25 start with 25 you can probably out of those 25.

514

01:10:53.460 --> 01:11:01.260

Limitless Adviser: start at least to get one or two, it does take a while to get to the five or get to the seven to get to a consistent five and so.

515

01:11:01.800 --> 01:11:05.940

Limitless Adviser: One of my favorite hacks and something I learned for Center of influence is.

516

01:11:06.840 --> 01:11:14.550

Limitless Adviser: While sometimes it's harder to get the first introduction to a client it's not hard to get an introduction to professional partner that they value, one that was super cool about that.

517

01:11:15.000 --> 01:11:22.050

Limitless Adviser: they've already done, the very Center of influence that they tend to be pulls my favorite question at the end of the coi meeting, especially when I started this is like.

518

01:11:22.470 --> 01:11:31.950

Limitless Adviser: who's most influential partners in your life and why Oh, they sound amazing, would you be willing to make an introduction love it yes.

519

01:11:37.200 --> 01:11:37.740

Limitless Adviser: i'm sorry.

520

01:11:42.120 --> 01:11:43.290

Limitless Adviser: As far as.

521

01:11:46.020 --> 01:11:58.440

Limitless Adviser: referrals assets revenue number referrals yeah and then I break that down one step farther number of qualified referrals because that tells me if I need to have a different conversation or not isn't that cool.

522

01:11:59.910 --> 01:12:03.600

Limitless Adviser: Like I wanted them to get to referring i'm hoping i'm educating them right and it's not.

523

01:12:04.110 --> 01:12:12.480

Limitless Adviser: i'm coming back to that conversation biggest breakdown and referrals is, aside from alignment is education you're like i'm awesome for me people.

524

01:12:12.930 --> 01:12:19.800

Limitless Adviser: It was a big curtain with the front of the stage, and you have no idea what's behind it, but please refer your most valued clients, would you do that, no, you would not.

525

01:12:20.370 --> 01:12:25.770

Limitless Adviser: But when you pull back the curtain, which is what tiffany does over a process in a team building way following model like.

526

01:12:26.070 --> 01:12:34.290

Limitless Adviser: Collaborative connection open communicative collaborative connection like it's over and over and by the like you're like wow like these people are actually legit.

527

01:12:35.160 --> 01:12:44.160

Limitless Adviser: So you're again you're not going to get all of them you're not trying to you're trying to see what's who are the people that are like minded, who are the people that are aligned, because when you find those people yeah.

528

01:12:44.550 --> 01:12:54.120

Limitless Adviser: there's no work right that you're looking for the wow we've got to create space, you need a system of reasons, but a lot of time, going back to the Michael and 70 Congress, they could spend a lot of time in terms of that return on marketing.

529

01:12:54.600 --> 01:13:07.200

Limitless Adviser: haven't lunches and having conversations and making lots of friends, but not turning that into any kind of a financial outcome for you or for them and, ultimately, while it is relationship oriented it's also revenue oriented.

530

01:13:08.100 --> 01:13:17.550

Limitless Adviser: And that's the goal and one other thing on that Center vincent's when they introduce you to other people what I love about how this starts building your brand and like just the like.

531

01:13:17.820 --> 01:13:27.780

Limitless Adviser: tornado of Center of influence success is that the next thing you know as you were just with this person because it's really important that you're able to build your brand and you're able to build.

532

01:13:28.020 --> 01:13:38.700

Limitless Adviser: Your trust equity when you're not in front of them as well, so when I go to lunch with this person that they referred inevitably they're going to lunch with me like oh my God I just met tiffany and she was so awesome I loved entrepreneur line like that's awesome.

533

01:13:39.000 --> 01:13:47.760

Limitless Adviser: And then I go to the other one and then that one happens to know this one and it's just like it just streamlines so those questions are really important than the next thing you know i'm like oh man.

534

01:13:48.180 --> 01:13:53.490

Limitless Adviser: The four of us have so much fun together what if we just did a quarterly mastermind together.

535

01:13:53.820 --> 01:14:04.500

Limitless Adviser: So we just met consistently Now I do, that I don't have for lunches I have one, and we all do it together and we come together with intent and now I have a Center of influence mastermind where we're creating intention.

536

01:14:04.860 --> 01:14:13.740

Limitless Adviser: without having to do for additional meetings super fun how this ends up working out and, once you get a few you come down the pipeline and that funnel.

537

01:14:14.310 --> 01:14:23.070

Limitless Adviser: get your five get your seven to get your five yeah yes so uh you guys we've got kind of like the process onboarding commitment one year of relationship building.

538

01:14:23.790 --> 01:14:34.530

Limitless Adviser: Right, so that first quarter is going to tell you, like fully upper out you're going to make a decision about like actually something's worth investing in i'm going to pull them in for another quarter if, after one year, they have not made a referral.

539

01:14:35.910 --> 01:14:43.350

Limitless Adviser: put them on the list, no matter what they just go back on the list, because all of that good 90 referral it's all there the drip will do it, but.

540

01:14:43.920 --> 01:14:50.910

Limitless Adviser: You got to redirect your energy to someone who's ready to receive that energy and turn it into a referral over the course of 12 months

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