

# LIMITLESS Coaching Call Transcript

MARCH 7<sup>TH</sup>, 2023

CLIENT ENGAGEMENT IN ACTION

what I was hoping to do was dig into some of what we should get, that some of what we discussed in the first session, but try to.

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Great, like.

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About it in the abstract, and and so that's what I wanted to do.

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Now some of this we can also really just back to what more I can say that are.

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So maybe I could just start and ask, if there were any more questions that came up that didn't get answered for today.

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Anything that you want to address before we do. When we send out before, when we send out information to a client before meeting, we're asking person data, and we always ask, Is there anything you have on your mind?

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Should we be flushing that out even more about, and is okay to put the 2 together, and each one goes first.

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In the question, or should I give you some emails? So I'm gonna answer in general terms.

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But one of the examples.

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The process, and how we get it from couples and what not.

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So, I think you can put it all in one year, depending on the depth of information you're asking.

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I mean, if it's too much, and I always start with, and I got into, you know, conversation after it as well about the fact that when we ask all these questions of clients before immediately the challenges it may get in the way that work so hard to create and there may not be time to get to

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everything, but in a similar way, you know, like about understanding what it's saying in your talk about not just what you want to talk about and being willing to.

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Sometimes bush technical conversation, or a planning conversation to perhaps a different need. Right?

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So that's where the conversation?

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In some ways that you drag engagement out of it.

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Typically, you know, there's one more engaged than the other.

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To zoom settings, the other is a little more in the background.

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So how do you drag? You know we're not equal engagement, but more engagement out of less engaged stuff.

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They feel like, yeah.

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So, to summarize, if that wasn't captured how do you get in both talking?

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How do you engage both partners? Hello, to address this in the example? But let me just.

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We can all agree. There's usually a non-technical yeah, yeah, as you say.

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But often it's a lot change. Find that most often.

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60 40. I also wonder if demographics will play a role in this going forward engagement in future.

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So there's a couple of things that come to mind for me is one. And I. It struck me as I said.

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Non-technical spouse sometimes do.

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Probably the rule that. Let's face it. She is often playing in that relationship.



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So, and so I only say that because I think some semantics might matter here, and if that's the case, then maybe our approach is to say, well, once a year we have a family we'll say planning planning.

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So it's other a family meeting. We're our focus is on vision and on where you're going.

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And everybody gets involved. But you know what, CEO, you don't probably wanna show up for me.

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So it's a different way of looking at it.

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Do? They have to have a question for you? The actively involved in every decision.

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And you'll be managing the money.

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Well, I guess it look along those lines because my guess.

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Is, that person is probably managing the household.

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And the other is managed, the so depending on how much you get into both sides of that you may need to vote there at all times.

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So!

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The only slightly facetious, but what I tend to hear is well, this is what I wanna talk about is like super technical.

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So if I just slow it down and look deeply in her eyes, and try to engage her, maybe she'll send suddenly become interested in what I'm saying.

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It's sort of like when people don't speak the same language, and they just talk slower and louder, and think it's gonna be understood.

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But if if gender changes so mighty for my test, who was quite literally brought up in the AI with a fork and talked about money, I mean, it goes that deep.

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But he if our adviser said, Look, what we're focusing on is your son, and how we're planning for the education and your mom and have he's going to be deeply interested in that agenda.

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So maybe we just need to change that up.

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And those things come true when we gather in. So I'll leave that.

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From those people trying to take us back to that example earlier.

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You can't just get input from one. You gotta get it for both we've got to use that to drive a conversation.

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Yeah. Alright.

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Yeah, good relationship. Slow down and all.

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Yeah, right? So yeah, online, you know, we can have clients who are satisfied but satisfied with different things.

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I mean, I guess our starting point is understanding what they're both interested in, because I mean to some extent we can say that.

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But we really know, like, do we have real data that says this is what keeps him awake at night?

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They? You know. Do you find one couple who both happen to be engineers?

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Are telling you. They want incredibly detailed reports, and the others say, No, thanks very much.

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I just want the, you know, to meet it back right? So that is what feedback does.

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It gives you those insights, and it allows you to personalize and go right down to tease out those.

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So if we I was gonna use this example, starting with this framework and kind of drill into it, because what we see here is that there are 3 distinct objectives measuring and advancing the experience optimizing service growth driving meaning interactions.



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I wanted to spend more time in the middle of the circle, but have the, you know this is your session, so I'm obviously happy to spend time where you'd like.

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And in case it's not obvious, the reason that we believe so, and we have to start this process with input is simply this that you're not a proxy for your clients.

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This is a quote from what our clients, but I thought he put it very well, and it's this idea that we know people so well, or we feel we know them so well that we don't really have to ask them all.

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Yeah. It's somehow we have an insight which seems reasonable enough for clients.

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Oh, we know what's not true, I mean you would never go home and save your your partner.

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Look. I think I got it. I don't really need to ask how you're feeling anymore, because I pretty much figured it out after limiting like we. Just it sounds ridiculous, but in a way that is what we do with clients.

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And so we're just trying to get that same same.

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The other thing that I find helpful as we dig into this topic.

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And it's just semantics. But it's differentiating between feedback and input.

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So, Clinton feedback I would describe as answering the question, How are we doing?

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How are we doing in delivering service? So are you satisfied?

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For all of those things give you a rating on that.

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Those kinds of questions. Client input to me is more about how the client is doing.

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Hey! What do they want? What do they expect? Have they feeling?



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What are they worried about? And all of that? It doesn't measure how you're doing.

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It's designed to inform the experience. So we don't do.

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You could have a program voices, the client program. It never asked about satisfaction.

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But you don't have to go down that path and part of the reason I clarify that is because often it's those metrics that scare people.

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When I, when I asked why we're not gathering it, because you could see even earlier, it's a fairly small percentage.

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Sometimes it's fear.

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I just you know. What if they're not happy? You know I can tell you. I see the data.

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They're happy if that's not the problem. But maybe that's the type in us that worries about these kinds of things.

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But a plan input is always about. And and it's always about what they really need.

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There's also a 1 million different ways. You can capture this data.

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So just contextually before we look at some examples, we talked to Bill, talked about surveys and whatnot, but it could be through an advisory board, and there's qualitative and quantitative ways.

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And then.

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Trying to understand. So what you're trying to understand is how often clients want to meet, or what their preferences are, and Advisory board isn't really the place to do that, because you're getting a sample to 6.

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If it's we really value or we're thinking of extending our services into different areas or redesigning our website.



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That's a conversation. And that's where focus groups or advisory board start to really work.

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Is anybody in the room? Do you have an advisory Board?

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Yeah, you guys, and how do you find it?

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So you identify the clients she met a couple of times with them. And what kind of topics do you focus on?

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Okay.

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Okay, so we start with, how are things? Repeat the question, yeah, okay, sorry.

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Yeah. So first is really just what's going on behind the scenes.

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Second is, How are we doing? And then the third feels like it opens up into whatever you need, and put on conversations.

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Is it valuable? Yeah, very about it. Hello, advise reports.

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Thank you. They're not always easy to manage.

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I know people who facilitate them on behalf of advisors cause reality is, it takes structure, and to make sure that you're having the right conversations to distance yourself, I think that's part of the problem we get we're very in love.

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With our own businesses. So sometimes, having somebody else talk about that as well can be helpful, and I see both work very effectively.

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So I do love that idea. I know others who do focus groups, the only difference there being one has a life and ends.

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It starts and hasn't been. So. There was a particular issue that you wanted to do a deep dive on.

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You could have a focus group or 2, and that would be it, whereas the Advisory Board is obviously ongoing you could. You can also think about surveys if you wanna more structured conversations.

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So, a conversation conversation like me. I'm gonna meet with one of my clients for coffee once a week and I'm just gonna take the opportunity to ask them how things are going to happen to have a set of questions that you're asking so it doesn't become just a free for all and you walk

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away!

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Surveys again. Work really? Well, when you're trying to get out to all your clients, you wanna quantitatively, there's all sorts of reasons that they were and then we're gonna talk a bit about that one to one feedback idea.

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So pull it that a little. We started it with the main stage session but we'll jump in and talk about that in much more detail.

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Alright, so let me start at the outer circle, and just, and we talked a little bit.

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And we're back louder. You better alright!

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Okay. So I wanted to talk about that other circle measuring in the hands of my plan.

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Experience, just to to clarify what we mean, and the kind of data that you can gather.

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So your worksheets, by the way, are really just designed to cover your sections, that we're going to cover together, and each one is built around the same set of questions.

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Do I need to accomplish this particular goal, this goal in this case being.

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Measuring and enhancing the experience with, how am I gonna capture that information?

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Right? Is it informal? Is this survey? Is there some other way, and then?

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Station that they're more interested in capturing like this is something that you're more interested in. It.

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And I say, survey and I say, survey, I'm just going to use it. And I say, Survey, I'm just going to use the process of capturing it doesn't have to be a formal survey by her imagination on this.

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But if we look here, we're answering some of the things we might be doing is trying to understand.

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Satisfaction with the individual advisor. If you were across, what would you have?

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Multiple advisors in your firm net, promoter score.

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I already mentioned earlier, which is how likely? And then it's really all about the experience.

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So your goal was to deliver a great experience. What kind of data would you want to understand from your client?

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How about some of the base 6 that we talked about earlier?

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How often do they want to meet with you? How?

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Those meetings do they hear from virtual, or they like in person?

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How do they want to get education from you? Did they like video?

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Do they like more on demand?

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If you think about your whole experience in a service plan that you're building out even.

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And I know all of you are working on. Then then that's the connection.

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Every king that you're finding in that service. You might wanna ask. See?

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The answer. You have to grow up. Hmm, they want to go all virtual, it's such an interesting question, because somebody can actually ask it. In that case.

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But I've seen it manifest, and that is to say, talk to.

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We're going back in person. That's what we wanted to do.

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And I'll say that. Have you asked this I don't care like I mean ultimately, that's what we're saying now.

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All that means is, you have to find people who want that.

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Need so, but it can be difficult, right? I mean, I don't wanna downplay that question at all, because they may want things that you don't wanna deliver or don't want to think about.

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And I think there's the other reason beyond fear that many of us don't ask for feedback is if we have to be right and and we were working with a guy who had this.

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Why is articulating it? He always said, You know, if there's a Max murder in your bedroom and you turn out the lights, there's still an axe.

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Murder in your bed, you know you can't if they're feeling what they're feeling, and they won't. What they want.

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We're just trying to pull that out.

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So as you think about that, I think that the you know the easiest way to capture that information.

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That's where surveys are kind of an easy one, because you can do this once, or you could do it every but you get to everyone at that point.

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And you get a good, you could have a set of questions that you ask, you know, at the end of every review, and over time you would build up that data as well so it depends on how you prefer to operate.

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But I would say.

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Thing that this does? Is, it gives you an opportunity to follow up so as soon as I ask, are you satisfied with the relationship?

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Anyone who said, There, we always use a 5 point scale. Anyone use it.

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3 or less is at risk. In our view, it means they're neutral, somewhat or very dissatisfied.

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That's a phone call that needs to be made. So part of that goal is to tease out, yeah, if they're dissatisfied, you probably know about it right?

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People are very good at sharing their feelings about that.

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But if they're neutral, nobody identifies as neutral in, that they do on surveys.

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And so I think when somebody is in that category, that's just the opportunity to sit down and say Hello, I'd love to talk about what we could do to make this.

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An incredible experience for you. And just really dig in a little.

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So we we can follow up.

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We value that people get financial class.

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Like, maybe each people don't wanna be. Maybe they just wanna go on with their lives and they look at us, as you know, we allocated this to this person.

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They'll let you know if anything's going on.

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It's a great question, and the only way that I would challenge that is, we don't know what we don't know.

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So oh, exactly exactly so. When you ask clients I'll give you an example on our study when we ask them to rate 70 different things, one to 5, based on importance.

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The things that come to the top are trust ethics, responsiveness, just the kind of things that you said so you could argue well if we just deliver.

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That's great!

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I don't think clients always know that there's another option.

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So to me the risk is, you don't deliver on all of those things.

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Well, and then somebody else comes along and sits down and says, so talk to me about your mom.

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You said she was aging. And how's that? Feel?

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And you know we can randomly probably help you with that and make sure it's part, you know, I didn't know that was in need until somebody talk to me about it.

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So that's the only thing I think we can possibly miss.

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But you're right when we just ask out right people are gonna go to the basics of Do.

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Are you executing on the service that I expect?

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I hear you the second part of the question was, gonna Be the unknown unknowns, you know.

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How do you flush it?

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Yeah, like, don't know what they don't know and we know what we don't know.

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I think we're obviously concerned with the with the for the clients.

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Perspective like, How do you get there? So get deeper other than the aforementioned?

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Well, other than that, I mean I don't know if it's other than that.



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But tell me if I'm off base here, it's I think we've got room to get better at probing and going deeper with clients and those questions, and that's you know I mentioned earlier.

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Sometimes these data points, these polls and surveys all they are are a prelude to a deeper conversation they give you something to click on and say, Huh!

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Can you tell me a bit more about that? Can you tell me how that makes you feel?

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Can you tell me? And then sort of teams out what's really really happening?

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Did you have a?

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I have a few from virtual folks, and then we'll jump over to Lyle.

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Sounds good. Okay, focus groups. Does your firm have qualitative market researchers or subcontract for them?

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Or Diy, do you have a qualitative marketplaceer that works in the advisor markets?

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So partner with Steve wishing on things like advisory boards.

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I don't know if you know him, but he's he's built a business around facilitating advisory boards, so rather than build it ourselves, we said, we know what we're trying to accomplish, but we'll bring him in to actually do the facilitation, and then

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we do the broader analysis. Okay, and Paul, do you have a list of questions from a qualitative survey?

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You can share or sell to us.

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No, the so do I have them, sure, but it's but really that is the business.

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So like we say, sell like people in us if they want support in designing the survey and executing it and bringing it to life.



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The people who don't engage with us, or tend to be.

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You know we're good doing it ourselves, like there, you can get surveymonkey for free right?

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You don't need us for that kind of stuff. It's more.

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What questions? And how are we gonna use it? And that sort of thing? Okay? Awesome.

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And one more. Do you mean number number of client households to utilize your company for quantitative?

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You need large numbers. Yeah, it is. So, the reality is that you have the number of clients you have.

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Like we we can actually change that in statistically, the smaller the number, the larger the percentage you need because the margin of error is just going to be huge.

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That's just the reality. When you have.

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It's still a good response rate. But margin of error is going to be higher.

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So that kind of data I look at that much more directionally.

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So I think. Are you trying to do quantitative research?

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True Quantitative, statistically valid research. Or are you just trying to get a sense of how people are thinking and where individuals are thinking and using that to drive different kinds of conversation?

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So it will be more directional in that case. Well, did you have a question? Yes, so back to what we were talking about before, I think.

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Paul Richards tells the story all the time about when he was, he met with a client first engagement, and the guy said to him, some call, ask them like what you're perfect relationship is, gonna look like.

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And he said, some of the effect of I will never hear from you.

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And so, or 8 months call got a vacant, and he went back to client.

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He said I you did all the planning work. He did everything he was supposed to.

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What happened?

00:33:45.000 --> 00:33:51.000

The world, you wouldn't learn from me, would I?

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Would never even.

00:34:11.000 --> 00:34:19.000

And trust before we deliver. And there's a good chance that that client we're believed that we thought they did.

00:34:19.000 --> 00:34:41.000

But at the end of the day, if you know, in case if Carl was sending some great content on whatever, I don't think we would have sent it back. You said, I mean, we just never wanna hear about this, you know, at all question, yeah.

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And input when a client, I believe 20 meeting expectations, setting expectations.

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And I meet them. The client is gonna go away happy.

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And so above and beyond is great possible, that's what it is.

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If I am asking for a client to input and so that whole co-create that you were talking about this morning, how often do you want to meet?

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How do you want to meet my business? Can't support having a different service model or a different timeframe, or a different things for all these other people?

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And if I how do I manage? You can tell me what you'd like but you may or may not get it right, so don't feel like now.

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They expect it, because they said This is what I want from you, and you ask, and now I expect you to give that to me, and we all we all know that we are not gonna have an efficient practice.



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If we're meeting with all these different people at all these different time.

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Lose, control. Yeah, so when you're asking for that, 2 things never ask that you're not willing to deliver, you control the questions.

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So, do you have some friends that say just to pick up on that question, how often do you want to meet?

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Once, twice, 3405. You know what they've got a system to handle that.

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It's just automated within the Crm. There's some workflows that do that.

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That's not how you're set up, is it?

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Once or twice like I I would just limit that.

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I wouldn't go deep into reports like, I think the worst thing that we can do is ask something, but we're not willing to change or can't change right.

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So I'm gonna see? What like what do you want on the custodial statements?

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Right, because I can't change that. So that's one thing the other thing is how you follow up so let's assume we've got a question that sounds to have a lot more flexibility.

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But you really don't want to understand what client it's not.

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I would follow up with every client, whether.

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How often people wanted to meet, we've heard is that people want teams per year in general, is it like you've splendid?

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It. At that point you can follow up with an individual, and but you've let them know that this is the expectation and what they can expect.

00:37:04.000 --> 00:37:27.000



Hmm, interesting follow-up to that question, how often your experience do you actually see where clients are asking for more of a close or more financial information that we think we need to do?

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Let go of that stuff that we think is important sometimes. Hmm, so then respond, based on how they've been trained.

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So if you have for the last 10 years met your client sport times a year, let me say how often.

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Clever about that. Then it's like you, you know, would you know, if we could meet your needs?

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Zoom, meetings, or would you like you know, we just, I think, got to just acknowledge that bias they can creep in, based on experience what we're talking about now, said we're going to some different examples here is relationship.

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And expectations, but can also be about your planning for the business, and some of that wonder woman.

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So I wanted to share some examples as well.

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So, as we can talk things through some of these as we go.

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So when we think about that experience, what are we trying to understand like satisfaction?

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How often and when we've had a long of other, it's coming up, I think, as we've talked about this to, you know, some sort of strategic operational decision making, I really wanted to deliver to the.

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And what's satisfaction again, when we're talking about frequency of contact we're not really talking about engagement.

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Satisfaction about how often we meet engagements, about what we talk about when we meet.

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That's what's gonna make the difference. There.

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We start gonna be in a circle a little. There's some interesting examples of how we can use input to optimize servicing growth in a different way.



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So in this case, what I'm thinking about is, how can we will some of the untapped opportunities on existing client so the topics that they're interested in yeah, and we can do that through a different set of questions that we might ask so in 2 parts sort of the what are you

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interested in, the referral piece. I'll give you some actual examples of how people are losing this data.

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This question, sounds very simple. Wouldn't you interested in learning about one from one of the most effective questions on surveys?

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Because what happens these people are ringsing your hand and saying, Tell me more.

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Well, you couldn't risk for a better entry to a conversation.

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You depend on your business. One of 2 pads are going to be of interest.

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Maybe both you could look at this as a way to introduce concepts that you want to talk to clients about.

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So how are you interested in learning about? You know?

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Esg, I wouldn't phrase it that way.

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That just descriptive are you interested in learning about how to communicate as a couple money? Are we interested in learning about transferring or structuring your investments that align with your values?

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That's actually more how I'd handle Esg.

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But so the idea is that there's a service under there.

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There's a phone topic but then you're saying, Yeah, tell me more.

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I'd like to know?

00:41:09.000 --> 00:41:13.000

Put to construct some of the communications that you might deliver.



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So let's say you send out articles, or you run an event every year.

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Are you have a newsletter, or what have you? This kind of question will tell you exactly what's on people's minds, and I think, allowing them to personalize in a in a fairly automated way.

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Let's call it I'm not gonna say it's you know let's look at an example.

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Sorry. That was 5, 4, 10. Thank you.

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May I just clarify something? I thought it was a quarter past with with the questions or.

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Okay. Thanks. So let's see, if might have been interesting about sending out to us as part of a survey it's just a separate quick call that takes a minute to complete again, really easy to do and to execute.

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Let's see on that list. I had topics, you know.

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Illness, managing, stress, sending goes from next year, and things that aren't necessarily about the work you do, but things that might be of interest to me.

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And in the basis that data could if we were to talk automation, that data could feed into a hubspot or a constant contact or chimp. If you use those kinds of systems.

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You sent me this article from Blue Zones about making sure my home is set up in a way that supports my health.

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Yeah, it seems like a simple act, but it's really quite powerful, because now you've heard what I said, and you've responded.

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So let's take that just step further.

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Can I go? Backgrounds?

00:43:04.000 --> 00:43:09.000

It's the yeah. That's what I'm pressing it.

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Thank you. Yeah, once it started, I sent that article out there so just a reminder notes.

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I only get super bear with me, cause I think this is the time to do it.

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If I'm sending out an hour in order to incorporate a few pieces of information.

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So first of all.

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Interested in this topic. That's why I.

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Someone was the key points in there. How was it learned? Okay.

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I'm getting as well.

00:44:04.000 --> 00:44:10.000

What kind of content that people share with others. Interestingly, look at that.

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Okay, so so what I've got at the bottom is I've used words that people will talk about this topic with.

00:44:12.000 --> 00:44:17.000

Some of the things you're out for dinner with your friends oh, God, I can start Monday.

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I've got so much to do I've got so I've actually incorporated that into.

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Was just talking to Sally about that last week. Got to forward this article when you're forwarding that article.

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There's 2 choices. They could either just take the whole thing and forward and add the email.

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Oh, you could have like a click to share link and I don't know if everybody is using those.

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I quite like them. You'll see it's hyperlink it's not hyperlinks. You can do that by clicking here to make it easy.

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So, and I'm happy to send you the string of code.



00:44:56.000 --> 00:45:01.000  
It's I could do it. It's so easy.

00:45:01.000 --> 00:45:09.000  
Basically, what it does if you're not familiar is as soon as I click on that, it opens an email that you've pre-populated.

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So now it says, Hey, Sally, don't know. It's Sally yet.

00:45:14.000 --> 00:45:15.000  
I mean information. My advisors shared some great content on health and wellness.

00:45:15.000 --> 00:45:22.000  
She's always doing stuff like this to really help with the stuff I'm interested in.

00:45:22.000 --> 00:45:24.000  
I thought you might find it a value and you know, if you're interested in connecting, here's a link right?

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So you write the message they can edit it. They could delete the whole thing if they wanted.

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But you've made it easy, and you're controlling the next.

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So when we get into this stuff, I think it's just about really thinking about this detail to get the most value possible.

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You might also think about this from multi-gen perspective.

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So imagine, instead of asking clients what they're interested in, you created a separate poll, that your clients could share with their kids right?

00:46:05.000 --> 00:46:11.000  
One of the things we're doing is trying to deliver value to your kids in the next generation.

00:46:11.000 --> 00:46:19.000  
Would you mind just sharing this poll? And you collect that now you've got a reason to connect with that next year on the things they actually care about?

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Not the things they're paying out, which often we fall into that trap of doing.



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So I wanted to focus on referrals as another.

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So it's again kind of wanted to get into some more explicit examples of how this can all work.

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Yeah, question?

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Right.

00:47:05.000 --> 00:47:08.000

Yeah.

00:47:08.000 --> 00:47:19.000

I would like to know the answer to that.

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We've gone through this process before as part of another program, and as stupid as it sounds.

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We spent an hour Googling, like we had a list of topics.

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The team went out, found some great evergreen articles, and that became the content.

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So you're not seeing whatever you're interested in, we're gonna send you content.

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It's like, here's 5 topics, and we know.

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And this is where the team can be really helpful, because they may be reading about it as well.

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And then they get old at a certain point like that article.

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We use that for a long time is really good, but I think it's probably over a year old, so it might be time to to actually look for something different.

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So I mentioned referrals as a way of optimizing and tying this back to input as well.

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A number of people on surveys will ask questions like, Are you comfortable?

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Referring even the net promoter score. It sounds like a referral question.

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It's really not. It's about the relationship. How likely are you to recommend the best question that we found is, just, have you provided a referral straight up?

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Have you done that over the course of the last year we find that anywhere from depending on the year around a third of clients and often more, will say they've referred you exactly meet most of them right?

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You probably meet 5 to 10% of them because they didn't position it.

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Well, they didn't, you know they, whatever they didn't make it easy.

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It's nothing to nothing that you're doing wrong.

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It's simply this missed opportunity. So what I really love to do with that data is to say, Okay, let's say, identify everyone who said they referred.

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Figure out!

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Ones who did not. So the conversation and the questions might look something like this.

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I've got this client, have you provided a referral?

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No!

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Which of the following best describes. Why, you haven't referred anyone.

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I just haven't met anyone. 65, 75% of clients will tell you the reason they haven't referred it is because they don't know who to refer.

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Almost no one says it's because they're uncomfortable providing referrals like 5%.

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Maybe now, if I had that question. But I've also asked this other question, what are the most important ways you and your family have been impacted as a way of working together?

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So if you're looking at that and the basis for a really interesting conversation that I think is more comfortable than do you know anybody who'd like to work with us?

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And the conversation might go. Something like this. Hey? You mentioned you haven't referred because you just haven't met anyone I'm not unusual.

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It's not what we often talk about with friends and family, but the reality is that well, you need an advisor.

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They're trying to solve some sort of problem. I noticed you mentioned that one of the big impacts is that you communicate about money better join if I ask you about that a little how did that show up in your life?

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What did you you know? What? How did we help you with that particular thing effectively?

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What you're doing is you're getting your clients to write the referral script.

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All right, so you can dig into this and have a comfortable conversation with clients.

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Now, if they said they did refer, it's even easier.

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And you, if you didn't meet it, hey? I saw that you provided a referral, you know.

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We didn't actually meet anybody. But I was just wondering if you could tell me more about the issue that you were trying to solve, or the problem that you were trying to solve for your friend or a family member yeah, so you write the name down it's really about this what were you trying to do so that you

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can make that into an introduction because most people aren't making introductions.

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We know that to be the case. But the fundamental thing we know about referrals, of course, is that people refer to help their friend and family not to help you.

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And so we're just kind of leaning into that idea with data.

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The last examples that I wanted to share with you. And yeah, question, how do you structure?

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The, comments as to what your target avatar, is to say, don't send me the clients that need help with Mitaid.

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You know, but are in this sort of ranges, or I don't know that I have the answer to this, and you all may.

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Your client's job to know that that's just sort of what I believe, but what I also believe is that you can have a process to make sure it's kind of quick and easy to get to the heart of whether they're right for you so you know there's nothing wrong with saying you know we

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often the people we've added the most value for tend to be business owners who are looking to sell a business where you've kind of self selected.

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In that case, right? Like we know, there's gonna be some some income.

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And then, but then I think the related piece of that is, when that person calls and says, Hey, Bob said I should talk to you.

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I'm really interested in your thoughts on Medicaid.

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Then we need to have that conversation right? Oh, great question!

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So many people focused on that. You know what it's not really the focus of our business.

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But maybe I can help you. Yeah. So we have to be ready for that right?

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You can't, just because what do we do? Oh, sure, I'll meet with you.

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I'll talk about for half an hour, and then we're stuck.



00:53:01.000 --> 00:53:06.000

Make gotta make sure that doesn't happen.

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The last sort of section is really the one to one.

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So we've talked about these processes for capturing input and maybe it's a survey.

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Maybe it's an advisory board in the. When we were doing the other presentation, I shared an example of capturing input before.

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Where we focus a lot of our energy. And it's the idea that we're trying to capture the right input all the way across the client.

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Journey, so, rather than somebody needing to take 10 min to do a survey you want them to take 2 min all the way along, and just give you the right information at the right time.

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Now this isn't about satisfaction. You still need to do something broad based for that.

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This is more about what they need, what they wanna talk about.

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And so we can look at some examples here, when at these different stages.

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So when somebody is visiting your website for the first time, when somebody is, and to meet with you for the first time when they're a client, and it's a couple.

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And we talked earlier on about engaging couples. So I wanna come back to that a little and look at that.

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I I actually think this concept of reveal and respond configuration can fit right across the client journey just in very different way.

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So let's assume I'm gonna use the word lead to describe someone who visits your website to learn more about something. Braille.

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We don't know why they're there. At this point. I think a lot of us make aptions about why they're there, and that's to learn about what you do may not be true.



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And information on problems that they've identified. They may not be ready to meet just yet, and the problem that we've observed is a lot of people visit websites, and if they're not ready to meet, they disappear.

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So unless you've got a lead magnet on your site, some reason to engage with them right?

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Now lead. Magnets are great, but again you have to assume what they're interested in.

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So we really like this idea of capturing input as a way to engage, so let's assume somebody's visiting a website.

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And it says, Hey, glad you're here, you know. If you're you know, the right plan always starts of an understanding of where you're at now, and what gets in the way.

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If you're interested in answering a few questions, we'll send you a quick report.

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Now bear in mind this is stuff that can be automated.

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So it's not you wouldn't wanna do this all from scratch, but it's a live example.

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So as that lead. I think that sounds interesting. So I'm gonna click on that.

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This is a an example in the wild I'm gonna answer some questions.

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Maybe it's about confidence. Maybe it's about what I'm worried about.

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Maybe it's about my history with money.

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For you to book a meeting. I can answer those questions. I can invite my spouse to answer those questions, and then automatically get an email that says, thanks for stopping by.

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Here's a report that shows you how you answered, and how you might want to think about that information, and if I click through I can see well, here's how I answered.



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Here's how my partner answered, and then there's some insights along the lines of you know.

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Here's some questions you might want to ask yourself, or when you're sitting down tonight, or if it's an individual, if you're thinking about legacy, you know.

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Have you considered the following again, it's meant to be a stand alone, but you've created an engagement, and of course you've captured their contact details at the same point.

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The difference is now you have that opportunity to reach out and say, Hey!

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I noticed you, you know. Did that quick assessment?

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I saw that you're really focused on market volatility right now, if you'd like to set up a quick time to talk about that, we'd be happy to do that more targeted right?

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So the concept I'm using in a very different way.

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But the concepts the same. What are we trying to reveal?

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And then how do we respond? And this is before somebody's even set a meeting with you.

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But if we move along to say, Look at the next stage now, they've decided you're what they need, or possibly they wanna come in and meet with you.

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So now what we can do, we've already talked about this process of inviting input from clients to drive the agenda.

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What if we took that exact same process and applied it to prospects?

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So now is there booking a meeting with you? You're asking them to share some input to drive the agenda and to focus that agenda on what matters I've seen a lot of agendas and they make me sad because and I'm sure it's nobody in this room but what I

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can tell you is, I think I put myself in that position, and I think I've never met you.

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This is the first time we're sitting down. And no, I'm not bringing every piece of financial data.

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And like you haven't even learned the right to have this conversation with me just yet.

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We need to talk about me, not what you can do for me just yet, like you can build that in.

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So, what if instead, we use that same process client books and mean or prospect books, a meeting?

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They're automatically directed to that quick poll. 2 to 3 min, and they're responding, you know.

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Again, what are you concerned about? What are you worried about? What do you want to talk to us about?

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Maybe even their history with working with advisors, I mean, now they're ready to meet with you, so you can ask different questions of them.

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But the idea is that you're doing all of this to have the best possible, most engaging conversations with that prospective client.

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But you needed their input in order to do that, reveal and respond.

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You could even ask them on that, poll. What they're interested in learning about, and that can become the follow up.

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So if in my poll, before we met, I said, I'm really, you know, really focused on making sure my kid makes good financial decisions.

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There's another quick article as a follow up great to meet you.

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I just thought you'd be interested in this again. You just have your library of 5 or 6 articles that you might send out in this case.

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Does that feel different like? Can you see how the input is driving a different kind of conversation?

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And the last area that I wanted to really focus on was couple.

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So we've already talked a bit about this. So I'm gonna jump through and just show you the example.

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I think we've already identified the issues right?

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Like, we're not always engaging with couples.

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It's difficult, I can tell you. You know this came up earlier. I was.

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I wanted a focus group for a firm in Canada.

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Investment, very very high net worth clients. And there was one woman on the panel.

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The client couldn't hear any of this.

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This was just for us, so I won't tell you what kind it was, but she said she like it was torture, because I thought if they hear what she's saying right now, it's gonna kill them.

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She said, you ignore me. You don't take the time.

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My husband actually knows way more about investments, but I care very deeply about this.

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She then went on to talk about the fact that they were Muslim.

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And why send me that port gift at Christmas like it was just like madness, I thought, Wow!

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Just didn't track key information and use it. So it's real.

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I mean, I as I heard this woman talking about it, I thought, Wow!

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This this is an issue. So I think the point that we can try to get to when it comes to any form of feedback is making sure we're getting it from both cases right?

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So the example I showed you earlier was, James is coming in, and James fills in a poll, and we've co-created that agenda in I think we can look at it as I've got James and Mary coming in, and even if Mary's not showing up we know they think differently, right.

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He thinks everything's awesome, and she's worried.

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Would I be saying is, look Mary, even if you're not coming to the meeting do you mind taking a few minutes and sharing some input with us?

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And again, what are they? What's the level of confidence?

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How are they feeling? And you? What we can do is take that idea and bring the data together to inform an even better agenda.

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In this case, right? So imagine, now, you've got your input that you're capturing.

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It comes back now you've got it from both people, and now you can sit down and have a completely different conversation, and it's not only the data like if I said to you, I'm worried about market volatility that's a fact.

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Today, it's a point in time. Fact, if you could also see that the last time we met I wasn't worried at all about that.

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That change over time tells you something else. Oh, you went from confident to less confident or worried to more worried.

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And how I compare to my spouse if we're talking about a couple is yet another data point.

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He thinks everything's awesome. You're not sleeping at night, that's what we've got to talk about.

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That alignment between how you both feel.

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So all of this is kind of leading us down a very different path. And I appreciate that the examples I'm giving you are those where, if you're using more of an automated solution.

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But the concepts apply, even if you weren't, how can you get intentional about inviting input at the right time?

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And using that to inform the experience. And that's, I think, where we start to head toward engagement again, whether it's just the conversation where it's the content, where it's the events.

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The more that's directly responsive, the better. And and what these examples also remind us.

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And it came up earlier. Is that the the case has to align with the type of input.

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So if you're asking about feelings, it has to be when we're about to meet.

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I can't sit down and go. Well, 8 months ago we did that survey, and you said you weren't feeling great, so let me just assume nothing has changed. And you know we're not gonna do that.

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It's gotta be now. So it's a slightly more complex way of thinking about it.

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But I think this is where we're going, and this is engagement.

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And this is personalization. So even if we can just take one of those things and say, Look, I'm just gonna invite input before review meeting, even though she peppered us with a 100 ideas, you know, then I think we're getting closer.

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So I'd be interested to know what resonates with you, with you all, and I'm just gonna I put this up earlier because we did.

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There's a form at the table as well.

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If you're interested in connecting few people at asked about how how we connect, can connect and talk more, you can use this, or you can just reach out.

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But with all these things that we've talked about, we just have a couple of minutes here, I'd be just interested to know where.

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Do you see the gaps?

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Well, something that we've been working on our office a lot is trying to reinvent or map out our service model.

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And then thinking about, okay, when do you engage? And what does that look like?

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And thinking about it kind of like a Widget factory.

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But this has gotten a lot of the wheels turning because it's not that that stuff can't have a place and exist kinda in our business model.

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But it's okay. Maybe it's meeting frequency.

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But this is more meeting, content. And then how we can make sure, you know, if it's those, just because calls are something having a better framework on, why are we reaching out?

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And what is the input that we're trying to draw back out of them?

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And that's kind of where this is filling that gap for me.

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I'm thinking about. Okay. The service smell can be laid out pretty easily.

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Now, if we are being more intentional about dining, what is it stuff that we're trying to tease out of them and setting that up prior to each of those engagements?

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Yeah, and think about it almost like you're painting right?

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So you get the core right first. How often are we gonna meet with clients?

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Great, next layer. How do we automate that so that it comes up at the right time?

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Next layer. What's a really good agenda next layer?



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How do we like their input on that agenda? We don't have to do all of this at once, but we can build and build with as long as we're intend on moving toward engagement.

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Then I think that gives us some direction. You have a question with as long as we're intent on moving toward engagement.

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Then I think that gives us some direction. Absolutely engagement.com.

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So it depends on the path you go dinner, I mean I this is, we've certainly built technology to do this.

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However, if you're doing it, if you're gonna do it on your own it, any of these survey tools will work, and I say, Surveymonkey, just because it's the biggest and it's not expensive.

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You have to know what questions to ask, and have somebody to send it out, but that is the path I would go if if you're doing that on your own, because it's pretty easy to do, and it'll you know aggregate the results.

