

LIMITLESS Coaching Call Transcript

MARCH 7TH, 2023
NO STRESS PROSPECTS

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Bionic environment if you're at on, it's literally like he.

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All of that is done by the website. By the time that they schedule call, there's a 90% probability it's going to be a good fit.

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They have a call they're in or they're out, and he moves on.

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Keep in mind, though it like I'm still investing the time.

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I'm just investing that at a different point in the client relationship.

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Right. If we think of the top, middle, and bottom of funnel from a marketing standpoint, this is definitely bottom.

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Of funnel activity right here the strength and consistency, and breadth that you have in that top and middle is going to dictate how quickly you can accelerate this automated process exactly. If you don't have that brand equity.

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If people don't, if they haven't binged, listen to you.

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And a podcast and they don't know who you are.

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You will likely have to spend a little bit more time nurturing that relationship.

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If slash when they get to the bottom of this funnel.

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But if you're allocating a significant amount of your time and energy capital into building that brand awareness at the top and middle, you've spent that nurturing time, albeit at a scalable manner, all things being equal, that's the trump card to the top and middle of funnel is that



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those artifacts that you're creating the website again.

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Not to deviate too far here, but that is the scalable and evergreen model that you can create.

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The one-page plan process. Excuse me. These say, as prospect process, that is a one-to-one, that your lather rinse repeat right that manufacturing process.

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You will see if you invest the time and energy on those top 2 ends that you will be able to refine down the steps of that of this prospecting process.

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Start here, though, unless you are extremely clear, and you have the essential social proof to know that jeez, I'm spending a lot of time.

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These prospects and this was my epiphany. We were like.

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Don't stop there if you don't have the reason to. Don't be like oh, I don't need to do that, we were spending so much time with prospects doing this one page plan process and the say, yes, prospect and we started to realize a theme that most of our Ods were

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like can do. We can do that. Can we just start working together?

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And so that's the benefit. So you've heard us say, if you're an alumni, if you're new, you might not have heard this before.

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Rip off and deploy is step one. We're gonna give you right?

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The process, the structure, the scripts, the samples, the letters are all in the library.

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Adams, and many other advisors, and then you're gonna refine it.

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I call it honing your craft. Adam did not start here so it's always I have to be so careful because everyone's like, Oh, you know, Adam.

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And I'm like Adam, 5 years ago, was sitting over there going.

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Oh, my God! How do I get this thing to work just like you that's what's so powerful about being in this room.

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But what we wanna do is make sure we have a core process that follows these basic steps.

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For most of you, whether it's a personal connection a coi or a client referral that sends them to the website they're gonna go to the website first, you just have to know that.

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So go to the websites that work less than, or go watch it in the library, because it really matters because it's going to do a lot of that relationship, filtering and trust equity right?

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There. These steps are designed to vary intentionally, irrespective of pace.

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They're very intentionally architected to cover the think, the feel, and the do, the way that we teach you to do them.

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So we're going to go through each of the steps a little bit more deeply.

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But the basic process is initial inquiry in that we're gonna filter right?

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I used to have those conversations in the practice that I worked in in my job was to see was this someone that we could add value to legitimately?

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I knew that if I could show them the steps and the how that they had an 80% probability we didn't start there but that's where it ultimately got, or was it not?

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And I realized when I was calling prospect after prospect for the follow-up conversation, that they really didn't hear as much as I did about making a decision about this thing, and I needed a way to get people off the fence so this thing and I needed a way to get people off the fence. So this is designed for fit it's designed

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for value. And it's designed for fit. It's designed for value. And it's designed for movement. Right?

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Like, can we get people through the process? So if you don't have the website, then it's your your practice manager, your office manager, your assistant.



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If it's not that, if you're not at that place of having that, then yes, it is going to be you as the advisor, doing that the hardest part.

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If you're the adviser doing that initial fit call is to not get sucked into the yeah.

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And again, if you get to the point where you can convince that because all that equity is built up that's very different than trying to accelerate it, because you're impatient Yup. And that's a distinction that we need to make so these are the basic steps of the process right the initial inquiry is going to come in the way that it.

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Comes in how are right? So we wanna make sure we send those messages that are invalidating and affirming and really building all that client experience.

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And we're ultimately going to get to that, learn more call which is going to be at 15 or 20 min call to genuinely filter for fit and fit isn't just assets and revenue.

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It might be those psychosocial profiles. Are you willing to pay a premium for that right customize service relative to the plan that your employer offers that's what we're ultimately trying to get to so that we're not wasting anyone's time

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there's or ours. If we can add value, let's do it.

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And if we can't, or we think it's going to be a fight, we're just that.

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That's not a ring. We want to get in our question that we found a lot of success with is what is the most important or pressing financial concern that you have, that you're looking to have solved.

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If we got something that they put student loans that was not us.

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So we make a referral to Rob Bertman and student loan, planner.com.

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And I used to literally get people on the phone. And I would say, Hey, you know what I have learned over the years that we are in the planning business, not the emergency business and this is, you know, Randomly, wake up at 5 in the morning and go.



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Hey? I think I wanna call like there's usually sort of reasons.

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And so I'm really curious what is on your mind, and why today and all I had to do was be quiet, which you know can be a challenge.

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In fact, then was even more so. Just be quiet, and they would tell me exactly.

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Hey, I've got an Rsu issue, hey? I've got an expatriate tax issue, hey?

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You know, my mom's like I, we all these problems.

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And we have kids and parents. And we just we don't even know which way is up anymore.

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And we just realize we need someone to help. This is where doing that, using scheduling software.

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I know we're going to dance to find lots of strategic and tactical in this conversation.

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It's really easy for me. Want to get sunk in. Sucked into the tactical side of these are the tools, and this is how you do it.

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Quick note on that scheduling software is a very, very powerful tool to help answer the first 2 steps of this process.

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So again, you can have your website. You can have an office that asks questions that linked right to make sure people are kind of asking those predisposition questions.

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Then they get here. By the time that someone gets to this, and you've asked that open question.

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What? However, you ask the why are you calling me today? Question the goal at this point is then to incorporate your position and your brand messages.

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What are the things you want them to know about you without just that?

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All over them great. So this is where you're gonna find out, like, what are your differentiators right so if I'm in Isaac's position where his clients are right with tech companies, and they have employer sponsored providers that are cheaper obviously but they're not going to do what they do

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what's one of the things we wanna do in that call right?

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What do we wanna filter for?

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Value, toleration. Right? Are these rate low-cost people who are never going to?

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If there is a cheap option, I have to take it is just a real percentage of the population.

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And then there are people who are like, if it's more expensive, it must be better.

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I need that and we're not judging. We're just saying we need to know what kind of person they are, because the fact that they're with Google and they have our issues doesn't necessarily mean that they're going to be really up for what they're offering at the price point that they're

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offering it for so I'm just using that as an example is one of the conversations is right.

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We understand as an employee of Google Us you have a lot of options.

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There are other firms that can do things right at a different price. Point.

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Our firm is really about we've understand that there are different kinds of firms.

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We believe that? What did I just say? Always better, but I never said it.

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I never talked about them. I didn't touch it. I just said different firms have different approaches we understand that you have some options with your employer-based provider.

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You know, and that's a good option. If you're just starting out.



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And you really, economy is really a thing for you. What I did just say, if you are a penny payer, that's your way. But if you're a penny, pincher, that's your way.

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But if you're not a PIN, Pincher, don't go there.

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I said that without saying anything so I think that's the messaging that we're talking about in that conversation where you're screening for fit beyond.

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Do you mean my Ica's from an au!

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I'm in a revenue perspective, are you and your case willing?

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Do you want a differentiated premium provider?

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If you don't, you're probably not a good fit I would own that in the conversation, if you're the kind of couple who really wants that premium service who gets that time and attention and get customized, solutions, and we're going to be a great fit for you and if you're not that's

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totally okay. You're Google has blah blah blah blah blah blah blah blah blah blah blah blah blah blah blah blah blah blah.

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Because if they're a they're gonna love me more.

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And if they're B, they're gonna move right on.

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And that's okay. Because they're gonna to move right on. And that's okay.

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Because I gotta go find some more. A's so that's what this call has the power to do.

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So again, the top of the funnel should be filtering the right people to you.

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But this is where the money hits the road, or whatever that saying is.

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Rubber hits the road. This is where he. Yeah, I should not use those analogies.

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This is that moment where you ask a few very precise questions to really Surface, who should move on and who should not?

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In a way, this is so important. This is the integrity based process.

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So let's everybody leave with their dignity intact. Hey?

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I can see, you guys are earlier in your career, right? Managing budgets and expenses is a bigger issue for you.

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We do right. We do a lot of work with executives that are more senior because they're really ready for that level of customized planning.

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We love the opportunity to add value, but from based on what you're saying, you know, we think this firm might routinely be a better option, for, like great notice, there's no there's nothing built into that.

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It's genuine. That's the hard part.

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It actually has to be genuine. So that's why, having the right client, knowing your vision, having that confidence in mindset, becomes so powerful, so can you see how at this point I've done a couple of really fun things I've gotten really clear why are you calling i've drawn some

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positions. Do you have a couple of minutes? Would it be okay if we had a conversation about who we do our best work with, and the kind of issues that we can help solve for so that we can learn if we had a conversation about who we do our best work with and the kind of issues that we can help solve for so that we can

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learn if we can really add some deep value to your situation.

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And you can learn if you really want us to or not.

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That's literally what I used to say to people, and they feel like great.

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Okay. And then I would ask them every find, like, I would literally get everything.



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Now, I'm not even saying you have to go that far, but, like people are like, I can't ask them.

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This. I'm like you can ask them anything. The question is, what should you ask them?

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And the answer now is not too much.

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What's the Mvp data that you actually need to determine if they should move to the next step again, the top of the funnel.

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If you're finding that there's a real misalignment.

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That means you have a problem in the top of your funnel.

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That's so. This is where you're solving for it.

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But you want to solve it sooner. Does that make sense?

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And this goes back to the more clear you are on who you do your best work with, and what their pain points are, the more concise you can be with.

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The information has right for us. It's 2 years. Business returns 2 years.

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Personal returns, or it was when we were doing this 2 years business returns, 2 years, personal returns, trailing 12 practice financials and investment statement like, I didn't even care what the portfolio was.

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I just need to see what the dollar amount that they were working with was.

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But in all honesty it was around the practice financials and the tax returns, because that was the minimum amount of information that we needed to have to provide maximum value.

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Early on in the climate, relationship. And it wasn't a significant lift for them to be able to provide but if I'm a generalist advisor to play the other side of that card, I might have a thirteen-page fact-finding document that I would send because somebody might have rsus and some people might have

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commercial real estate, and some people might have businesses, and 520
nines, etc.

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Social security, statements, right? The more clear you are on who your
ideal client is.

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The narrower. You can take down that information. Ask, and this is where,
when you're asking for that information, you're now, then, putting that
which we're going to give some some deliverables here that that you can
start synthesizing that information through the through your analysis and
build what you're

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eventually going to present to them. So we're going to go through each of
the steps a little more deeply. You and I, every single time we do this we
start talking about every step in that first slide before we forget it.

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So look at me painted. So this is an example of like just how you
represent it.

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If you can't package it. So look at me, panted. So this is an example of
like just how you represent so, however simple it is having a start
process or a five-step process, or a something, people's brands go.

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Oh, it's intentional! It's probably disappointed and smart.

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I get it. What we're trying to do is Peel back the curtain.

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Do you know what happens when you go into a financial planner's office to
work with them?

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Yes, you do. Does the average client no. Do they like that feeling?

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No! Are they already overwhelmed? One is like. So we're adding,
overwhelmed to overwhelm.

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What if we just told them what the process was, hey? So I literally in
that learn more call would lay out the whole process, and I highly
recommend you.

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Do it, hey? Right the next step in the process if you want to move
forward, is we're going to have an hour long meeting, probably a week or 2
out.



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I'm gonna need to get some deeper information. So that we can make sure that the time we spend together is valuable.

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We have enough information right to give you some ideas and thoughts about how we can add some value to your situation.

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At the end of that meeting the truth is, you're gonna know we're gonna know a lot more about you and whether we can add value.

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And you're gonna know a lot more about us, and whether you want us to.

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If you decide to move forward. 2 weeks after that, we're gonna have another meeting, and we're gonna do this.

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And then it. And they were like, okay. So I was seeding those key messages every single step in the process with clarity and intention.

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So anyone ever take speech in high school or college? Right? What do they teach you in speech?

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What is the one? The most like the baseline rule of speech?

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You tell people what you're gonna tell them you tell them what you're telling them.

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You tell them what you told them. It's totally true.

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Here's what's gonna I would lay it out. Hey?

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If we decide to work together, we're gonna have a series of 3 meetings.

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Here's what we're gonna do on an ongoing basis. We're gonna have meetings.

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And over the course of meetings. We're gonna work with your whole team, and they were like, Oh, I peeled back the whole curtain.

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This is amazing with cois. By the way, they really appreciate it that's all baked into the coi lesson.

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So that's really an important part of the process is give their brain something to sink into.

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What is this thing, this ambiguous squishy around the edges thing at this point we can't put all that in a website, but we can say, Here's the process.

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You're going to go through. And here's the part that most firms miss the outcome that you're going to get on the other side.

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You've got to sell the outcome in the sales process, not the features and the benefits you've got to sell.

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The outcome and for what it's worth we would hear from prospective clients that, just knowing that we had a process, gave them more confidence in our firm because they knew what to expect. It.

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Deescalates the unknown, it deescalates the the friction in the relationship.

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Nobody likes to go into the unknown. Yeah, brands don't like it.

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It creates stress, it increases anxiety.

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It. Just tell people what they're going to experience, and that adds the again that adds to the brand equity and credibility that you already have to know that they're going to be taken through a process.

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And here's the deliverable through that process. Yeah, so the things that aren't gonna differentiate you, we're not saying that they're not valuable.

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And you're not going to bake and seed them into the conversation.

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But you're not going to lead with. I'm so awesome, and I have the best performance.

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My best reporting, and I have 5. This, this and this degree, and I have amazing service, and I'm knowledgeable and caring, and you and everybody else.

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Yeah, like, I mean, but that's what we used to do.



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Right. That's what advisors would do is we provide our quarterly performance statements.

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We'll meet proactively to go over. We would, we would pontificate on what we thought was valuable to them, rather than asking the simple question, What do you care about?

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And that's what separates us that's what makes you stand out in a crowd is to care about what's top of mind for them and have a process that allows you to uncover that right the mark of a great advisor.

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You want better ask, want better answers, ask better questions. And so this process allows you to ask those questions and find out what they actually care about rather than us having to guess at what we think that they want.

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So the goal in the end is to stand out in the crowd that is ultimately we are trying to do so.

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I think you have worksheets on your table as we're going feel free to take notes in each of those sections.

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If that just helps you sort of retain the conversation, will record this, so you can go back to. You're right.

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We made a mistake again, because we went through all this.

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I know I told you, but I stopped I caught us in step 2. I'm feeling pretty good right now. Right? So step one. You've got that.

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If you're not using the referral roadmap when you get a referral roadmap, when you get a referral, a client, or a center of influence, or an right so step one, you've gotten that if you're not using the referral, roadmap when you get

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a referral from a client or a center of influence, or an you really, unequivocally need to have rate of thanks and so we really want to create a much more elevated effect and experience.

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I always talk about potty trick my son Parker's 15.

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He loves when I tell these stories now, but when he was little and we went to go potty train right when he went potty in the big boy Potty for the first time.

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Thanks Daddy, send him a thank you. No, dear Parker, thanks for going potty in the big boy.

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Potty, Xo. Mom. No? Why, what's the what's the response?

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I'm gonna get from that. Nothing. Now. On a handwritten note in today's age is actually really cool thing.

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So I would highly recommend you. Do that. It's part of the process.

00:33:18.000 --> 00:33:25.000

And when Parker went potty in the big boy party, what did I do?

00:33:25.000 --> 00:33:33.000

Like a crazy, stupid person. I thought I was reasonable at like up to that point, and then I'd like all fell apart, cause and then why?

00:33:33.000 --> 00:33:36.000

Because I wanted him to feel good, so that he would do it again.

00:33:36.000 --> 00:33:42.000

I want you to potty train your clients, I mean.

00:33:42.000 --> 00:33:48.000

That would love, of course. Right? You wanna will hope experience. And most of the time it's a thank you.

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Note that's only 54% of the time. Which means, what about the other 40?

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4%. It's less than that which is sad and scary.

00:33:56.000 --> 00:34:01.000

So the easiest way to make more money is not to lose big chunks of it.

00:34:01.000 --> 00:34:08.000

When someone makes a referral love all over them, the referral roadmap puts it in 3 or 5 steps to whether they're a client or center of influence, like we've given you the formula, it works.

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You'll be amazed and astounded it's the simplest thing we just have to have the time and the intention to do it so that's the biggest part of step One.

00:34:18.000 --> 00:34:21.000



Someone's reached out. There's some reason they're calling you.

00:34:21.000 --> 00:34:22.000

Are you loving on the reason? If you have control over that step?

00:34:22.000 --> 00:34:29.000

2. This is where your website and your process. There's some really cool stuff that we can do. There.

00:34:29.000 --> 00:34:37.000

Now with videos and blogs where people reach out. And as soon as they hit that calendly link, a video goes back that says, Hi, I'm Adam or Hi, I'm right.

00:34:37.000 --> 00:34:39.000

So and so, and there's some story in history.

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And again, we're building that trust, equity. There's no proving.

00:34:42.000 --> 00:34:49.000

It's just, hey! As you come to sit with our firm, we'd really love to know about this, and we believe this and then they're like, Oh, that's nice.

00:34:49.000 --> 00:34:53.000

Right? So we're building that trust equity along the way and then we're ultimately going to get to that step.

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We talked about, which is screening for fit. Now I, in the practice that I worked in, did the screening as I shared before my principal was brilliant, but was not the best salesperson that ever lived, and so I, at the ripe old age of 20 thought I could do better than that turns out

00:35:08.000 --> 00:35:14.000

I was right, but only because he was that bad. That was supposed to be funny.

00:35:14.000 --> 00:35:15.000

Thank you. He gets a poker check right? It's one.

00:35:15.000 --> 00:35:31.000

But you're throwing it. I'm not. I'm not throwing it. Bring that one. Here's the whole thing. If you have someone in your office doing this, what can they do that Adam cannot do when he's talking.

00:35:31.000 --> 00:35:43.000

Like oh! Yeah, I would be like, Oh, this is my issue, and I'd be like, Oh, I'm so glad that you called you're gonna meet with Galen, and he is just so good at taking like these big scary concepts.

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And really simplifying them, and people come in with all these questions that I know every time they leave they just feel good, and they have a bunch of answers.

00:35:50.000 --> 00:35:58.000

So you know, make sure when we send you the email that talks about, you know the information and what you really want to solve for, please we're for real about that like, let us know.

00:35:58.000 --> 00:36:02.000

We're gonna make sure that when you leave that meeting you have answers to your most pressing questions, or at least the next step.

00:36:02.000 --> 00:36:06.000

That's really going to write add some value to your situation, whether you work with us or not.

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That's a really good process. And I could be like Galen is so awesome.

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And Caitlin is so awesome, I'm like, Oh, Kayla is going to do this, and Galen is going to do that.

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Galen can't be like Adam can't be like I'm so awesome I'm gonna simplify all of your you know, big but Adams assistant.

00:36:21.000 --> 00:36:24.000

Kathy can be like, yeah, Adam's really great.

00:36:24.000 --> 00:36:28.000

He's so good at kinda making the simple, the complex, really simple.

00:36:28.000 --> 00:36:31.000

Alright clients just really love that he knows their business so well.

00:36:31.000 --> 00:36:33.000

Adam can't be like. But you guys love that.

00:36:33.000 --> 00:36:37.000

I know your business so well, right? So if you have someone you don't have to.

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But if you have someone that's that next level of leverage is they get to sit in that seat.

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They get really good at having that conversation. A lot of firms that becomes an onboarding specialist when you get to a place where the pipeline starts to get really busy, that onboarding special.

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Or so someone can sit in that seat and do the filtering, and then Shepard clients through the process along the way again, leveraging the advisors.

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Time. In many cases you guys might have an assistant. That's really good in conversation. Who knows?

00:36:59.000 --> 00:37:07.000

Your firm that might be able to have this conversation. It might be a younger advisor on your team.

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The bionic version, if you will, that we've adopted in our firm with this is using acuity as our online scheduling right?

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It sends out confirmation emails. We send out confirmation emails 168 h, which is one week right?

00:37:20.000 --> 00:37:29.000

The week before the appointment, 3 days before the appointment, 3 days before the appointment, and the day before the appointment, and the day before the appointment, every single one of those emails that goes out does it do the table Stakes it remind them.

00:37:29.000 --> 00:37:37.000

Yes, but don't miss an opportunity to communicate what makes you different in an otherwise unemotional step.

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Right? Oh, yeah, if I wouldn't have done anything great, they got an email that their appointments coming up in a week.

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But that is an incredibly valuable missed opportunity, especially with the new relationship to seed with them.

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What it would mean to work with our firm how many of you have a letter that says, thanks for scheduling appointment on June sixteenth, at 9 0 A. M. Please bring with you your bullet point bullet point full of point.

00:37:59.000 --> 00:38:08.000

We look forward to meeting with you one. Yeah. So one subtle thing that we did even again cause just cause.

00:38:08.000 --> 00:38:15.000

I know there's advisors that are that have various goals with their practice is, and kudos to tiff.

00:38:15.000 --> 00:38:18.000

We she came up with a great phrase that they do at Destiny. Capitol.

00:38:18.000 --> 00:38:21.000

They eliminated the eyes, and mice, and that's what we did as well.



00:38:21.000 --> 00:38:24.000

So we don't use I and my in our email communication.

00:38:24.000 --> 00:38:32.000

So we we are in us. We look forward to meeting with you our passion is serving optometric practice owners nationwide.

00:38:32.000 --> 00:38:36.000

It's our commitment to you that we right get rid of the eyes and mice.

00:38:36.000 --> 00:38:41.000

If that's what you're solving for, if you're not, and it is the Adam show or the Greg show.

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If it's just you don't say we that'll freak people out.

00:38:44.000 --> 00:38:54.000

They don't want to stop the voices in your head that's free. There's a point. There is a point where you want to be big hat, no cattle. Yeah, that's free.

00:38:54.000 --> 00:38:55.000

There's a point. There is a point where you want to be big hat, no cattle, that's a phrase there for anybody that's there.

00:38:55.000 --> 00:39:11.000

There is a line. Yeah. But to that point where we up until this point, all the interaction that they've had with our firm has been online through the website or through our scheduling software, so when we have a client book a tree, Iage call within 24 h our workflow pokes.

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Kathy to make a phone call, and Kathy calls.

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Now, our data says, I think it's about 7 out of 10 times she leaves a voicemail, but it's scripted out.

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And Kathy knows what to say, and if they sometimes they call back, and they'll say thanks for the voicemail.

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Here's a little bit more information on what we're looking for.

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That goes into red tail that goes into the Crm, so we can see that right?

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We're sprinkling in that human interaction but we're leveraging technology to be able to provide that experience at scale.

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And then step 2. Is that learn more? Call that we talked about, and I think we kinda we dove into this.

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So I wanna kind of move on to that next step. So this is where we hit that premium do you wanna talk a little bit how you've automated that.

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Yes, again back to the combination of active campaign as our marketing tool as well as acuity.

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So what you're looking at here the well, the planning intake form.

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This is something that we have that we've done through so this goes out automatically.

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You can see the triage meeting details. That is a screenshot from the intake form.

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That is, from acuity. So in order to book an appointment in order to book a triage, call with John and myself we're on the call together.

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You have to answer these questions and these questions only give you the option of an ideal client.

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Now we are learning that people will still lie. They will pick closest to the pan.

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Answer, and we can filter through that, and that allows John and I to determine.

00:40:38.000 --> 00:40:39.000

Okay, I'll just take this call. You don't need to be on this one because they're not going to be an ideal fit.

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I'll refer them to the 2,020 money membership, or someone else, etc.

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But we're utilizing that tech to gather the quantitative information that's going to help us determine if this is going to be a good fit, Kathy, beforehand is the qualitative side of just how was this person.

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What, how did they sound on the phone? It's that human touch.

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So you're using that blend of tech and person to again just build, give that relationship an experience of what it's going to mean to work with you. Yeah.

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And then you want to follow up with that, because, remember, the first job here is you want to be consistent.

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Yeah, number one job in this process is to show them how you're going to show up as a trusted advisor.

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And what is the number? One job of a trusted advisor?

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It's to answer the five-word power question, does anybody know what the 5 word power question is?

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We talk about it on occasion. It's not do. I have enough money?

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Am I gonna be okay? The question they are always asking you that they will never say out loud is, Can I count on you?

00:41:41.000 --> 00:41:49.000

And that's what this process is really designed to say, hey, even before we have a relationship, we're going to show you how we're going to add value, because this is what it's like to work with us.

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So it adds point, we're gonna follow up with it right?

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Your standard confirmation email is boring this is where we're doing well. Since I've read ours before we do a little happy dance like we say, we're doing a little happy dance so again, you can do whatever you want we have clients.

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Now, Adam has a podcast. Right so now, clients with podcasts are doing like mini-two and 3 min podcast.

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Episodes, because that's how the audio is used to consuming it.

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We have clients who are doing really cool video campaigns like, Hey, we're so glad that you scheduled an appointment when we get together.

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These are the 3 things we really want to cover. Here are some examples.

00:42:20.000 --> 00:42:32.000



But like, you can basically tell the story in 2 or 3 min, and again depending on the time between the confirmation email and appointment, I like to push appointments out at least 2 to 3 weeks because it gives time to see those messages right?

00:42:32.000 --> 00:42:42.000

It says we're not needy. We're not trying to get you here in the next 48 h, and it gives me time to really start seeding those messages around again.

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That value orientation that we're really trying to create.

00:42:44.000 --> 00:42:48.000

So you don't want a letter that says, Look forward to your meeting on June sixteenth, at 8 0 Am.

00:42:48.000 --> 00:42:50.000

You want a letter that's as we really look forward to our time together.

00:42:50.000 --> 00:42:58.000

It's an opportunity to get answers to your most important questions, to get clarity about how we can help you simplify and organize your financial life and help you to insert brand message here right blah blah blah, build a wiley signature.

00:42:58.000 --> 00:43:12.000

Just retire with confidence, whatever it is now I care about this letter, because, without saying it, you just said, Hey, here's all this stuff.

00:43:12.000 --> 00:43:16.000

It's really important to you. This meeting is important, right?

00:43:16.000 --> 00:43:22.000

Cause. That's the position that we want to put ourselves going in, which is entirely different than our meetings on the sixteenth.

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At 40'clock. So that's where you want to go back to every single communication you want to think about how you're crafting.

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What are the medium that you're using? Right? Is it email?

00:43:30.000 --> 00:43:45.000

Is it? Video? What are the messages? You want to be seating? So that when you show up you are as much as possible sitting in that space, a credible expert and trusted advisor, because we've used this process in the timeline to bake that into the process again, if you've got

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a, podcast, or a blog following or Youtube, right? It's a lot easier because people are really getting all that trust, equity.

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And when they have the moment that they want to pick up and do something, they're just going to call you people just assume that they know Adam.

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People walk up to me at conferences, and they start talking.

00:43:59.000 --> 00:44:03.000

I was literally talking to someone, and they were like, Oh, you were talking to that person like, how do you know them?

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I'm like, I didn't. That person just walked up like, Hey, Steph, blah! Blah blah!

00:44:08.000 --> 00:44:09.000

I have a question. And I was like, Yeah, and you would have thought that we were friends.

00:44:09.000 --> 00:44:15.000

And I mean we were cool, but that's the relationship I have.

00:44:15.000 --> 00:44:20.000

Because you guys read my stuff or hear it. And so you're like, Oh, I feel like, I know, like, that's the goal.

00:44:20.000 --> 00:44:27.000

Ultimately, like genuinely in our case it might be different for you but and I know you guys hear this a lot so we're not gonna spend a lot of time on it.

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But you're not an ambulance chaser.

00:44:29.000 --> 00:44:32.000

Please stop acting like one. Please stop apologizing for yourself.

00:44:32.000 --> 00:44:42.000

Please. Stop apologizing for your bad peers. If one more person says to me, but people believe that financial advisors are, I'm like, yes, but a whole bunch of people don't think about that.

00:44:42.000 --> 00:44:46.000

And higher financial planners. Why are we not talking about those people right?

00:44:46.000 --> 00:44:51.000

So we just really want to set aside that fear and that scarcity right that I'm going to be a salesperson.

00:44:51.000 --> 00:44:56.000

And so I have what I call the 3 strike rule with the prospect process, which is once you've reached out to someone.

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You've had the meeting and they're gonna make a decision, or it's the learn more call that you're trying to schedule the next step is it's a 3 strike. What happens after you strike out 3 times in baseball.

00:45:07.000 --> 00:45:16.000

You're off the field. Well, I was sitting in my office years ago, calling people, and when I started I had that many people to call, and within a couple of months I had that many people to call.

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And it was like basically from morning to lunch. I was just calling people that didn't want my phone call cause they would not make up their day in mind.

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And I realized I had this epiphany where I was like, oh, my gosh!

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They can sleep at night without having a plan but I can't sleep at night without them having, like.

00:45:33.000 --> 00:45:36.000

I am literally more worried about their making a decision about their life than they are.

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And I was like, Oh, that's messed up. I'm not gonna do that anymore.

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So it's like 3 strike rule. We're gonna follow up and we're gonna be like, hey?

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And so every time this is all in the library you can go dig deep, but the rule is, I only follow up 3 times.

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First time, like, Hey, I understand. Yep, gotta put Mom in a home. Those are big decisions.

00:45:53.000 --> 00:45:55.000

We completely understand that planning can add a lot of value.

00:45:55.000 --> 00:46:03.000

Would it be? Okay? 5 magic words. Would it be okay if you can ask anyone anything without pissing them off with those 5 bunch of chores, they're magic.

00:46:03.000 --> 00:46:08.000

Would it be okay if we followed up tomorrow to see where you land on a decision would be okay if we followed up next week.

00:46:08.000 --> 00:46:09.000

But it'd be okay if we follow it up next week. But it'd be okay if we follow it up.



00:46:09.000 --> 00:46:14.000

Win blah blah blah 99.9% of the time people are gonna say, yes, cause you were nice.

00:46:14.000 --> 00:46:18.000

And you asked, so we wanna really sit in that space when we go through the process we don't want to apologize.

00:46:18.000 --> 00:46:28.000

Step! 2 right hey? Next week, follow up again. You're gonna leave a voicemail 7 out of 10 times.

00:46:28.000 --> 00:46:31.000

That's perfectly okay. Hey? It's Staff. I'm calling from Adams office.

00:46:31.000 --> 00:46:34.000

It's been a week. I just wanted to follow up as I promised I would.

00:46:34.000 --> 00:46:41.000

Which is what we do, what we say. You can count on just wanted to follow up, as I promised.

00:46:41.000 --> 00:46:49.000

See if you had any questions. I know you had insert personal message here I know that you and John were really focused on making sure that right mom got home.

00:46:49.000 --> 00:46:53.000

Kids were okay. I know those things are important. I know life gets really busy.

00:46:53.000 --> 00:46:55.000

I'm gonna follow up one last time next week if I don't hear from you, you've got our contacted for me.

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Great. But what did I say? I get? Life happens. But you said this was important.

00:47:00.000 --> 00:47:05.000

Do you really mean it? And I'm gonna follow up with you one more time.

00:47:05.000 --> 00:47:10.000

Third phone call email, whatever it right videos are really cool. By the way, do videos are really cool.

00:47:10.000 --> 00:47:16.000

By the way, do videos are really cool. By the way, do videos, there's so much more like we're just amping everything up next level, hey?

00:47:16.000 --> 00:47:17.000

Stephanie, I'm calling from Madam's office.

00:47:17.000 --> 00:47:18.000



Just wanted to reach out one last time. I know we followed up a couple of times. Life is busy.

00:47:18.000 --> 00:47:24.000

You've got a lot on your plate. I also know that when people reach out with issues like boom, boom, boom!

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Boom. They tend to be really important. It's easy to get strike tracked.

00:47:30.000 --> 00:47:33.000

No pressure here. Just want to let you know you're here when we're ready.

00:47:33.000 --> 00:47:36.000

I want to make sure you have our contact information don't want to be a pest.

00:47:36.000 --> 00:47:39.000

I would literally use those words. I don't want to be a pest I want to make sure you have my contact information.

00:47:39.000 --> 00:47:44.000

When you guys are ready to move forward. Know that we're ready here, and we're here and ready to help you.

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Please feel free to call anytime. We have a text expander email.

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That is the first strike Ky will do a phone call.

00:47:50.000 --> 00:47:54.000

That's second strike, and I do a loom video.

00:47:54.000 --> 00:48:01.000

That's the third strike. One of my favorite phrases, Mister Process, my goal is always to be a welcome guest instead of an annoying pest in your life.

00:48:01.000 --> 00:48:04.000

And so from this point forward I will leave the ball in your court.

00:48:04.000 --> 00:48:12.000

If something comes along that you decide that you want to reengage the process, please know that we will always be here all the best for continuing success, etc.

00:48:12.000 --> 00:48:13.000

So what you're saying is I'm a credible professional, and I've got things to do with my time.

00:48:13.000 --> 00:48:17.000

So when you're serious and you want to talk, let's have one.

00:48:17.000 --> 00:48:20.000



But until then I'm not an answer. That's where video like loom or bombomb couple of other platforms out there.

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Really it doesn't take any more of your time for our practice owners again.

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New York. Know your audience. There's a good chance that our practice owners cause.

00:48:31.000 --> 00:48:38.000

We don't know what their admin day is. We always ask when we onboard a client Do you have an admin day for phone calls?

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So we know in our Crm, this is the day that they're available for phone calls.

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We don't know that they're available for phone calls. We don't know that.

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So they're usually seeing patients. So we're expecting voicemails. He knows that because he knows he's playing.

00:48:47.000 --> 00:48:55.000

By the way, because he has a type of plan. But that's where you craft your system to have the most impact for the guard rails that your client is in right.

00:48:55.000 --> 00:48:58.000

That's why we do. The email is the first strike.

00:48:58.000 --> 00:49:01.000

Kathy typically will call, though she's usually leaving a voicemail.

00:49:01.000 --> 00:49:11.000

And then I do the video because the video asynchronously allows me to insert my personality and my voice and emotion much more than a voicemail, or certainly much more than a voicemail.

00:49:11.000 --> 00:49:27.000

So interestingly, where most people see drop-off in the prospect process is not from discovery to decision, although you will see that depending on your level of maturity in terms of building up the process and getting the right clients into it, a lot of people, especially when they tweet their process will see

00:49:27.000 --> 00:49:32.000

drop-off from step 2 to step 3 from the learn more call to discussion where you're like. Wow!

00:49:32.000 --> 00:49:41.000



I had the conversation it seemed like a fit, and then we're getting that drop off so that opium is a really powerful drug in the advisory I hope they call. I hope they call.

00:49:41.000 --> 00:49:46.000

I think they'll come on board. Right. Are they? Wildly off?

00:49:46.000 --> 00:49:55.000

Are they more new on stuff? Are we talking to, you know, Price Penny pinchers when we're in a premium space in the marketplace? Hey?

00:49:55.000 --> 00:49:56.000

We got to go back, and this is the radically annoying part.

00:49:56.000 --> 00:49:59.000

And I know I'm working with some of you on this, and you get it.

00:49:59.000 --> 00:50:02.000

You have to literally go back to every single step in the process.

00:50:02.000 --> 00:50:11.000

If you're really trying to master it and get it home, and it's so annoying, cause it might take a little while, especially if you're teaching other people to do it with you.

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But when you nail it it's powerful. So it's about really one identifying that they're right.

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You're either not having the right conversation, or your marketing funnels, not curating the right fit. That's it.

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There's only 2 options, because people do not pick up the phone and call you to have that conversation, cause they're kicking the time.

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I mean, we might look at that right that goes back to the client Profile.

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So again, then we can go back to the pre-process, pre-step 2 and start screening, and filtering and videos and looking at those things and see if that can build some of the trust equity.

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Some of you have other advisors doing it who aren't as talented as you are.

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Okay, that's where videos and those other things. Right to start to kick in, to build some of that value.

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Equity, right, so that they can show up a little bit more in the advisory space.

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So then you're ultimately, whatever the reason is, you're gonna get to the discovery meeting.

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And this is the heart of it. Now, here's the truth.

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If the steps in the process of the marketing funnel top of the funnel middle of the funnel.

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And now steps one and 2 of the process have executed well you at this point should have, without question, is 70 80% probability of retaining this client before you even have this meeting.

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The trick in this meeting is the value equation. Are they willing and able and happy to pay for the offering?

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The way that you've presented it, and that's Adam like, talk about like, what is the offer in this meeting?

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In our case. Rate, one page plan is some other stuff correct? So this is when you're having that conversation at its core.

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You're asking deeper questions about what it is that they're solving for what's their top pain point?

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And you're also going through and asking going. Oh, presenting or this isn't even plan presentation. This is just discovery.

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This is just asking more detailed questions about why they're.

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Why are they there? It's a fact-finding session, but it's more qualitative than it is quantitative.

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The quantitative part is the easy part. That's the factory work that's getting the date.

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That's getting the details in the data and the analysis which you will then present in the second meeting.

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So really good example. I was working with one of the sorry.

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The experience matters as well this is comfort, this is confidence. This is curating and outcome, and you can't just script.

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It time and practice so I was working with one of our firms, and the advisors in the firm.

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I was like record. They wanted the conversion rate they wanted.

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So I recorded the videos of the advisors in the firm, and they sent the videos in.

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And I watched videos. And in one of the videos, I literally watched he's like, minute by minute by minute, right?

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Like I'm taking notes the entire time, and I just see these moments pop up with the client literally, says the wife's, you know, like the wife is very standoffish. The whole meeting.

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She sits like this, and then something comes up and they start talking about a boat, and she, like leans into the screen, and she's like, Oh, yeah, it'd be cool if we got a boat like sailed around the world, and like she lit up.

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And the advisor was like, Okay, and tell me about was in the 4.

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Oh, onek! I'm not kidding. That was the next.

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It was some version of that, because he had the backfinding list.

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And what do we think we're supposed to do in that meeting?

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We're supposed to get all the facts and feelings don't really matter, and that's not a criticism of that human.

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By the way, that's just what we're taught to do.

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Like, how do I like I was like, oh, my God! This guy could have parted right there like I was like, Oh, my God! This guy could have parted right



there like oh, sailing around like I was like, oh, my God! This guy could have parted right? There!

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Like oh, sailing around, is that something you're super serious about?

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Is that something like we want to think about funding in your financial plan.

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Is that a wild idea and then I just be quiet. And then what's she?

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Gonna tell me everything that you need. And he was just again, not.

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In. This was, you know, pre doing the work. But that's where in that moment there is like there's no button that's going to go off over your head.

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That, says Jennifer. Now is the moment to have that really personal conversation.

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That's called experience, and equally as important, it's presence.

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Yeah. The the theme of the discovery is, it's hard to talk to people about their money unless you first talk to them about their life.

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That's essentially what you're solving for in the discovery process.

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So you don't have to go to every prospect and be like, hey?

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Tell me about everything that you feel in your life that would feel weird like they're coming to you for their stock, or their deferred comp for their retirement plan.

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That's the art of seating the again that psychosocial profile like, if a client's like, Hey, your clients are coming, they want to retire, and they're like, I can't even think about this for 3 years.

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Because like, that's what happens in their brain, right? They need a couple of years to know the checks are coming.

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Okay, but what we wanna do in this meeting is surface. What really matters to them?



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Not. Here's everything I can show you about how smart we are.

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Which is what we tend to do in these meetings, or like a lot of you, are doing, is you're spending a lot of time running the plans you're spending 1012, 1416 h doing the work so that you can show them a plan to prove how smart you are and what we know is you can do it

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with a page, or like a notepad. If you really want to.

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We did this one? Right? So this goes back to those seating key messages again.

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I want you to go back to every letter, every email, every communication I want you to read it through the lens of what am I actually saying?

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About what to think about, what to feel and what to do.

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Here, what's the message that I want to convey to my perspective client?

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And is this an opportunity for me to see that message that I don't know if you're like, hey, let's schedule.

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Another meeting is very different than Hey. After this meeting we're going to get together in 2 to 3 weeks, and we're going to talk about the plan that we designed together.

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And that's really going to be focused on how.

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And you and Bob can retire at 50 with enough money to enjoy your time, together without having to worry about this stuff all the time.

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Does that sound? Okay? With you? Yeah, that sounds great. Set it like my middle name.

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That's the part. So that's where experience scripts, by the way, are the cornerstone of that right right?

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The scripts, right like every email, every conversation it out like, what are the 5 things I need them to lead this meeting with?



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What are the 5 big questions I need to ask again, a lot of the samples and the scripts and the resources are in the library.

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So we've done 80 to 90% of the work for you.

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You can go in and write. Copy. Adams. You can copy tailors.

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You can use our best practices but it's how do you, tailor that message so that when your client sees it, Guillermo Lyle when your client sees it, or that potential client sees that they're like yeah, he sees me he hears me and if he

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understands me. What is my brain? Assume that Lyle can do?

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He can help me. There's no selling. It's just would you like to take that next step?

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And the answer, 70 to 80% of the time should be, yes, if you're not hitting a 70% conversion rate, there's a breakdown in your process.

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If it's over 80%, you aren't charging enough, or you need to narrow your niche.

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Ours is on a word document. I know there are platforms out there.

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There are some software. Some advisors have created some software using canva and excel and Google sheets, etc.

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Don't be distracted. I'm not saying that those are not good.

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Don't let the what now again a perfect phrase, for don't let perfection be the enemy of progress.

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Some work document works just fine with this, and what you'll find is that you'll see resounding themes.

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Our, our, our, our one page plans. When we were doing this, we're usually 50% of the way done because it was the same.

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Alright! Alright! So I think 80 million was last to you.



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Have anybody that's over 80 million we had I had, I had 35 and 55. Yeah. And this. And did they come to you and be like, Oh, you're making it so simple.

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Dude show me a bunch of companies that's over 80 million. We had 35 and 55. Yeah. And this.

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And do they come to you and be like what you want to demonstrate to people is that you can create a plan that gets them to the goal. I don't go to the doctor.

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He doesn't do the surgery and go see.

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I told you, he says, I think we can do this. Here's what's gonna happen.

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Do you want to pay for? Do you want that or not?

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And so that's what we really want to sit in this space. Hold on!

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I went back one too many. Where did it go for, anyway?

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It's gonna come back in terms of that one page plan.

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Here's why the one page plan is so valuable.

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Any best guesses out there. Poker chips waiting for you guys are getting way too quiet. It's the after lunch, low.

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Why is the one page plan so valuable?

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Simple, concise, tangible Michelle actionable shows you listen, which I'll get the next poker chip.

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Great? Is there any part of that that you don't want, or your clients don't want?

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Now, when I hand you you're gonna love this. This is worth the price of admission.



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When I hand you a 50 page financial plan. Does it check any of those boxes?

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No, the biggest reason that advisors struggle in doing one page plans is that because they're they're they lack self-confidence, and they feel like they need to prove that they know what they're doing.

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To look at all of this that I did. I know what I'm doing here. The same thing is that if you ask really good questions, and the client feels like you thoroughly understand, the interesting thing is that if you same thing when you go to the doctor, when you go to the dentist when you go to

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the optometrist. I don't know how they I don't know how the sausage is made.

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I trust them. I feel like they've thoroughly listened to.

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Why, I'm here in the first place, prognosis, or the recommendation, the diagnosis on a piece of paper.

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That's fine. Same thing the one page plan has 3 basic sections. You can do fancy, or you can do a 2 or 3 page plan. I like.

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I love Carl's one page plan. It's awesome, and it really works.

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If you wanted to. 2 or 3 pages, I don't care.

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It's about simple. 5 pages is not simple. 3 pages crammed with 19 pi charts is not simple.

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Don't lie to yourself, but it works because it has 3 core sections, one.

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What's important to you? What are those outcomes, goals, purposes?

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Whatever you want to call it right. I want to retire at 50.

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I want to send my kids to college. I wanna you know, started Charity.

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Whatever like those are people's motivations right? What are the things we need to be like?



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What's on the radar right now, right here's what's happening.

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And then last section like, what are the next steps? Those are the action items so a lot of what we have in here from this slide forward our scripts and resources.

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The one thing 30 s on fees, and then we certainly want to make sure that we have time for questions here.

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Notice that up until this point we haven't said anything about fees up in through this main point of process.

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What we do say one caveat, because we'll inevitably get sometimes when a prospective client calls in that first conversation, even if they book the triage call when Ky calls, they'll ask about fees.

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We give ranges we never quote the fee, because, quite honestly, we don't know what that fee is going to be, because we don't understand their situation, and so we will generally say if someone's asking early on in that relationship, or early on in the prospecting process whether

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it's before the triage call, or on the triage call John. I appreciate the question.

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We all want to know what we would pay for the services candidly, I don't know what your fee is going to be, because we don't know the details of your plan.

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At this point, however, knowing in the experience that we've had with practices around your size, that fee is generally going to be between X and Y, but transparency and honesty are 2 of our core values, and you'll never be surprised.

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So we always will communicate effectively. That is the extent of fees quoting the fees during the one-page plan process. Right?

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What did we say earlier? Cost becomes apparent in the absence of value, or the the derivative from that if we have no differentiation then everything comes down to costs.

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The secondary and Tertiary benefit of the one-page plan process is, it allows us to put context around what we're going to do as advisors.



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So we quote the fee for working with our firm at the end of the prospective client right at the end of the one-page plan, and we set that expectation upfront because we know it's on their mind.

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We know they're thinking about that so don't don't discount the 800 pound elephant in the room.

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John and Mary appreciate you being here for the one-page plan presentation.

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We're going to talk about 2 things, or you're going to have 2 decisions to make at the end of this conversation.

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Number one is we're going to look at our calendar and find a time to determine if we're going to be. It's been a while since I've actually done this script because we're going to be it's been a while since i've actually done this script

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because so that's not how it goes. You can work out. We do meant, we do say, early on in the conversation we set the expectation.

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We'll talk about what it would mean to work with our firm what the fee would be, and then we also will look at our calendar to have you and I just to just say, and again, remember I was in May 20 sitting across really rich people when I said, this which means you've got to own

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it when you say it, people at an energy level can tell if you're shaken under the table.

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That was the problem with the principle that I had. He was brilliant, but the second, that someone had the possibility to reject him.

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He just completely fell apart and I was just too young to care I was like, I have no idea.

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I just need a bonus. So you can literally sit across from people and say, Hey, it's really been great spending this time with you today.

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What we heard you say was important to you was this in this and this, and our feed of work to create a plan that will help you to what we heard you say was important to you was this, and this and this and our feed of work



to create a plan that will help you to put that, in place and achieve the goals that

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you shared are really important to us in circles here.

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If you can, is \$7,500. If you'd like to move forward our next like, I didn't take a breath it was like, and if someone objected to the fee, and there's lots of scripts and follow-ups in there, if you need to dig deeper into that is I just came up

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with one script that I owned, and I can say it to this day, which is, I can appreciate that you might have concerns about the fees.

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One of the things that we fundamentally believe is that our fees we've done the research.

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Our fees are the least expensive. What we know is, they're also not the most expensive, but our clients consistently tell us that they're fair for the value that we deliver, and we're not comfortable, compromising on our value because we're not you know our fees because we're

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not comfortable, comfortable, compromising. In the valley we deliver plants.

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If you have a different budget and a price point to meet that budget, we completely understand I'll be more than happy to refer you to some other advisors that are a better fit for where you are and the budget that you want to meet totally understand not going to take it.

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Personally, I think the planning has a lot of value for you.

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And if you feel like another firm is a better fit, that would be totally okay.

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Is there any loss there? If they stay? I'm confident and credible, and if they leave, they just didn't want to pay for what I had.

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And that's okay, cause I don't wanna deliver it for less.

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So that's where, whatever your conversation is around fees, you gotta say it out loud 35 times like you just own it and you can tell you can say it like your middle name rehearse it, because if you don't clearly you can forget it, which I have because it's been a while since i've done that



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script, and since I've done that script, and since I've done that script, and since I've said mine so many thousands of yeah, it's crazy alright. Everything that we've talked about right? We have resources on the website, that will help you fine tune and refine down this process I want to make sure that we have time for

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questions questions as well, Allison? Or, Yeah, I'm sorry.

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Okay, one from Aaron, ideally. How much time do you suggest?

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Be spent developing the one page plan, minimum to maximum. Oh, great question!

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I'll let you take that. So with experience, you should be doing it in an hour 30 to 45 min.

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I did, maximum, I would say gosh! If you're spending more than 2 h doing a doing a one page plan that's probably too much.

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We got ours down to about 30 to 45 min, cause if you've seen 1, 1120.

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Yes, you've seen a 1,000, and you know where the bodies are buried.

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You're going to spend 90% of your time. By the way, figuring out how to phrase things right like, is that not true that you're like, oh, so Michelle, I think you had had the question earlier right?

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Hey? We've got aging parents. So really cool, simple rule, whether you're using one page plan or not, use the clients language.

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However, you like it or not, use their language if they say my mother-in-law's husband is a Schmack, like great like right solve for this, maybe. Don't go that.

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But don't put that in writing actually right? Different example.

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But the point is, when people see what they in their words, their brain goes.

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She really got it? They they don't go.



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Why isn't she talking smart tomorrow? So that's a really important piece, right?

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So there's a lot of places that you can handle those issues.

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Yeah, question, and this might not be the session, for it.

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But on the one-page plan. How in-depth are you getting?

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We actually am pretty happy. We actually follow a very similar. This is the closest of what we're doing that you guys are doing.

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And instead of doing a one-page plan, what we do is we just we get everybody organized.

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It's amazing how many people. When you just show them a network statement just like an asset map, something like that we advise on Orion, but just like an asset map, something like that. The boat we advise on Orion.

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But it's just showing them that getting organized pretty quick and easy to do, it just blows their mind. But if you know, switching over to the one page how in depth are you getting there?

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Because it's like, okay to take it they have to act on it.

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Are you just getting high-level summary so the difference between, or the value in the one-page plan is not just making the recommendation.

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But why you're making the recommendation. Why is this valuable?

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Do systematic backdoor, raw conversions exactly.

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Okay, like, yeah, it's a matter of communicating. And what are they solving for? So it might be something that you provide income and retirement.

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Yeah, I want that but it's that it's like it.

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Every every align item on a one page. Plan should be no more than 2 lines.



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It should be ideally beyond one line. Correct? Yeah, if you're so, anything that's really narrative.

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And people have to really they. Then they kind of. They end up losing a lot of that key message, which is why bullet points tend to work really effectively.

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And so anytime you can capture those statements in their words, those actions. You're covering everything that they need to like.

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When you think about what's the brain need to leave a meeting?

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So what's the number one job? The number one request that people ask of financial advisors without it doesn't matter who your name is. Technical expertise.

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What is the number? One thing people want from you?

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Well aside from the feeling piece, like fundamentally like, simplify and organize every.

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Is there anyone here? That's where those asset maps you're hitting the key.

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Fundamental goal is simplifying. Organize. That's what a one-page plan does.

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So again. I'm not tied to. Well, I think the one-page plan is a super powerful concept, but totally use it right in a practice. That asset map.

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Those are other pieces that you can bring into that presentation in the meeting to say, Hey, you know we believe that before we can even apply all of our complex expertise that's overkill until we can help you really start to simplify and feel good about your money again or you're fighting your retire and then

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yes, okay. And then we move on to the complicated there's samples of our one page.

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Plan on resource are in the library. There's samples of our one page plan on resource or in the resources within the library.



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Yeah, there's loads of samples on Allison. Virtual question, and then, yes, quick, follow up on the fees. And then a separate question.

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So do you post the I know there's people dug into both camps on that.

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We I totally just. I totally disagree with Michael on this point, and I get to do that.

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Everybody does right. There is no right answer. Here's why there is no wrong answer.

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Michael's like I would never work with anybody that doesn't put their fees and I'm like, my doctor doesn't put his feet as a website.

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I'm not like, oh, I can't go to my doctor.

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He's trying to take advantage of me. And like professionals, just don't put their fees on their website.

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Now I understand there's a history and a context. And I'm just like again, I'm not going to try and solve for bad people doing bad things.

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I'm just a credible person showing up. Here's where I do like these on websites.

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If your pipeline it's too big. You put fees on your website and it will go down a little bit.

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And that's okay. You know, it's really cool about websites.

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This is amazing. You can. You can change them something like, Oh, my God!

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Should I put my fees on my website? And I'm like so rule one, do you have data?

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If you don't have data, it's not exactly a good time to change right?

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Get your baseline data if you have baseline data, go ahead and put your fee on the website.



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And in 30 days guess what you're gonna know with question whether that helps pull people in or propel people.

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And then you're gonna make a decision and you can take it off or you can leave it on and if you have too many people, you just keep raising it.

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Alison? Was there a follow-up question to that? Yeah.

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So the next one is that was a follow-up question to earlier the separate one is, is, it's still about a 3 year runway to get from doing the one-page plan to let's do this, meaning to build brand equity takes time to do the one page plan to let's do this meaning to build brand equity. Takes time. And do you send the one-page.

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Plan in advance of the meeting I don't think we've ever sent a one page plan in advance.

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The runway, I on one hand, that gives people context.

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On the other hand, I, my concern is that you anchor to that and say, Oh, well, it's just going to be 3 when someone's ready to take action.

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So it assumes that you have that runway, and that pipeline built up anything you're doing, whether it's a podcast or cois right, whatever you're doing to put people in this process it's usually if you show up consistently taylor jokes.

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It took me 5 cause he's like I took some time off in the middle.

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Yeah. And right. So if you show up and you what you work, the plan really, consistently, it genuinely is about it to that you can again, social media and digital allow you really accelerate that cycle, you can again, social media and digital allow you really accelerate that cycle. So you go hit a really awesome

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social media campaign. You can have plans tomorrow. You do a full cord press that's different to having a massive machine built out. We're like, I know, if I do a campaign a month. That's the part that great that runway.

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So everything that you're doing you should be getting some prospects along the way.



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You should be getting some that's the part that right, that runway. So everything that you're doing you should be getting some prospects along the way you should be getting some at bats and using this process and seeing that conversion rate, improve but you still want to check who is coming in the process right if the wrong people are coming in and they might look right compared to before you came to this meeting

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versus compared to after. Yeah, it's not a clip. We launched the podcast in September of 2018, April of 2019.

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It was rebranded to 2020, 20, and July. We were getting our first prospects.

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So can I ask you guys a question oh, there's a couple of 29. It was rebranded to twenty-twenty of yeah. So question for Adam. This objection that comes up about, do I have to give you all my money to manage how can I ask you guys a question, oh.

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there's, taxable accounts. One of the benefits of being an Ria is we're platform agnostic.

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So we will be the I mean. Gosh! We have.

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It is a sticking point on the 40. Onek.

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That we have probably half a dozen different record keepers ubiquity 4, one go guideline, Rpc.

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Adp paychecks like, and you're the advisor of record, and all of them with no exceptions for all.

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I hate to say it's or I don't want to dodge the question in.

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Say that it depends on a case-by-case basis, but it kind of does 4.

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One ks, are, yeah, that's a deeper conversation, cause they're pain in the butt.

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But on the non-qualified assets we will draw pretty the hard line to sand.

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I think Nick Murray again to channel him, he said.

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There's only one eyes an hour. There was only one eyes an hour on d d, and when everything goes up we don't wanna play this game of telephone and whether you're doing that or for Christians in here.

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Those stories are Solomon, right? There's just like you want one person well, it's a simple like, do you do?

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I have to give you all my assets, only if you want all my best advice, is the honest answer right?

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So your job is to, and I think it's a glutes to the slide you play.

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How you practice. Now, anybody here replace sports. Raise your hand if you've ever played sport, played an instrument.

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Anything like that? Do you show up on game day or show day? No practice.

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How many of you have practiced, like genuinely, systematically built a system written your scripts, practice your sales, process.

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Those pretty good right? Did it start that way? No, they were like.

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Instantly. Nope, we get so hung up on like, how do I apply this change that Stephen Adam talked about the resources.

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There are samples there. We have our calls right, the Gazillion Times. A month.

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We're here to support you the goal today is to really make sure that you're absorbing the information that says, Hey, how does my prospect process really sit in this space?

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Am I elevating the experience really defining my offer?

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What is your offer and your offer is on a financial plan.

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Your offer is your brand. Promise for your outcome in the marketing funnel.



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Your offer is the download or a free assessment, or something else.

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Now the offer is the actual offer, and that's what this entire process is.

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Driving to. If you don't practice, you're not gonna win the Super bowl.

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You're not gonna have that 70 to 80% conversion rate.

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You're not gonna have the confidence required to know in that first phone call.

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This person is not a fit I'm gonna cut them loose for their sake of mine.

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No harm, no found you're gonna try and stretch, and and then you're gonna it's like trying to get like the clown rope.

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But you just can't make it work. And then sometimes you make it work, and they become a client.

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You kick yourself later. So the goal is really not to do that.

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So again, there's a lot of reading. There's a lot of resources, lots of samples of Adams process, our process, and lots of other advisors to get you 80% of the way there your job is like a suit that you buy at a really fine shop you still have to take it to

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the tilor and nip it in tuck it. Who are your clients?

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Those messages that you see specifically, we understand that clients like you have a lot of questions about ours use and the impact that's going to have on their retirement and their income.

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Stream. They, we understand, is an expat that the 3 biggest questions our clients ask us are, our job is to sit in the space of answering those questions from you in a way that's simple and easy and organized, so that you can just deal with raid traveling around the globe and doing what you

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do. Yeah, I want some of that. You want to have a conversation with people that at the end they say, Yeah, Hi, want some of that? Because the one thing what's the opposite of that emotion on the why is can I count on you so powerful?



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Because it means you are addressing an emotional need that is gaping in most people's lives.

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Do you know what it is? You know what they want for me?

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Relief. They want relief. The questions, the problems, the concerns, is it it going to be okay? Am I making all the right decisions?

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I'm too smart. I can't mess this up.

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All of that comes at a cost. They want relief, that's all.

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This process is supposed to surface, what's on your mind?

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I'll tell you the technical stuff. We'll put that in the context of a plan we like to call that a container one-page plan would you like some of that?

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Yes, thank you. Right. Then we go into the serve onboarding in the service model does that give you guys some context for how to really elevate that sales process from a place of intity without apology or hesitation?

