

LIMITLESS Coaching Call Transcript

MARCH 8TH, 2023
MODEL CLIENT MEETINGS

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Stuff. It's me. It's unique. It's original.

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You're paying all that money for it. Do you know that the chef actually doesn't touch that plate of food that comes to your table?

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He has created a blueprint. This is the meal.

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This is how we cook the meal. This is exactly where I want those tiny little things.

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I want 3 sprinkles right here chefs are very particular.

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I kinda dig them in that way like it's perfection on the plate, like they have a way, and the only way to get that consistently is what to have a model.

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And then they have people processing platform in that kitchen.

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If you've ever watched, the movies or been in one where everything happens in a certain way, and it's it's a machine like it's just going down the assembly line.

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But in the end you get a feel that you've paid 200 and too many dollars for just kidding.

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Maybe you really enjoyed it. That meal was still an assembly line, but it felt what incredible!

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Worth \$400, whatever it cost you to. That's the goal of a model meeting.

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And the reason that we get hesitant when people, when I talk about these ideas right?



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The process is, they're like, Oh, Stephanie, if you are, you know, if you're scaling up, you're watering down the value to the client, and I'm like no, it's totally the opposite.

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When you figure out how to scale up, you have time for the special.

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So the model client meeting fits really nicely in the service model.

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Think about surges right, whether you're doing that or not.

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Every time you have a client meeting. What if there was a blueprint for that meeting?

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And your staff could make sure that the plate ended up on the table, looking delicious, and all you had to do was set.

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The blueprint for the meal. That's what model client meetings are. We?

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I want a way to demonstrate value consistently. But how much time do we spend?

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Prep you for meetings, having meetings and following up on meetings, and it's a lot of spinning what if it was just a process where you showed up in a step of the process where steps you did your thing?

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And he walked out, and everything else was taken care of for those of you that don't.

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Yet have any teams like we talked about. Yesterday. You're gonna have designated time in your calendar to be your assistant so that you can quantify how much time it takes to support you and then have that time available to train someone and manage them when they do come along the goal of a model client meeting

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is to make it as efficient as possible while making it as awesome as possible.

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And the big idea here is that more isn't better, better is better. So.

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Why do we like model client meetings? How many client meetings do you leave where you're like?



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Okay, check that box like it just starts to feel flat. And you're like, well, that wasn't everything.

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I'd hoped it could be. We want them to feel energized.

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We want you to show up, present and prepared, and everything is packaged that you can have that really clear, conscious conversation around that one page plan, or whatever your version of it is, so I think you would ask the question earlier that the one-page plan kind of becomes the agenda, in that model because it is the conversation

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that you're having. Now, you can have an actual agenda. Totally okay, right?

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It's gonna say, right, see the one page plan and talk about it.

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But it can lay out those things, the whole goal of the model client meeting is to make sure that you're showing up at your absolute best, consistently, efficiently, effectively, and enjoyably, that you're not grinding it out and picking up that file at the 11 h you rush into the room

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and be like okay, I'm gonna remember what we talked about last time.

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As soon as we start talking it will be in here somewhere, right?

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That's not the goal. So what is the experience that you are creating with your meetings?

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And if you don't have an answer to that question, it means you're not creating one. It's a default.

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So you're gonna notice this theme and everything we talk about intention, intention, intention.

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What's your best possible meeting, is it? 2, 2 and a half hours?

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No! How many you honestly have ever had a 2 or 2 and a half hour meeting lots of you.

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How do you think your clients feel about that afterwards?

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Exhausted. They're not like oh, that was the best meeting. They were like.

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Oh, that was great! But oh, my God! Can you imagine what it's like in the car on the way home?

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It's like a mini, limitless.

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Literally. And so our goal is, how do we make sure that we're creating experience that really lands for the client that value is rate delivered and perceived and perceived, and it also covers all the boxes we've got to cover?

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We actually have some technical work we've got things we've got to get done.

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And so we wanna organize that, how do we create a model meeting that really says I'm gonna sit in the seat of the partner and expert.

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And you're going to sit in the seat of client and we're gonna figure out how this goes.

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Exactly the way that we think, can we can have the best engagement with you?

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Right. You're not saying that to them. You're thinking that as you build your model client meeting agenda, what questions are you answering every meeting is a place to answer questions to.

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Michelle's question like, What does money mean to me?

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What do I want to use it for? Is my money aligned with my life again?

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You can go skinny or deep on the questions depending on you and the client in your comfort level.

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But have you asked yourself what questions you ask in your model client meeting, and why you're choosing to ask those questions because it's one of the most powerful tools that you have, and we're like throwing it around like a wet rope.



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It's like, Wow, I've got a sword in my hand, and I'm not using it.

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Right. So as you build value adds into those meetings right where you pick a topic that you're going to take all the clients through, you can come up with right?

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Is it technical? Are there questions around it? Hey? How do you feel about this?

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So you want to get really in what you're hearing over and over is rate system, process, structure, intention, so that we can make sure we can deliver it.

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So what are the best practices? Right? The meeting process and the meeting model.

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And we're gonna help you translate those into proven practices that work in yours.

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The question that always comes up with model client meetings is to surge or not surge model client meeting works, whether you search or not.

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They're building a an efficient process for preparing for a meeting.

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What surges do that is so powerful is they batch that right, think deep work by Cal.

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Newport, and do right like activities in the same time, where you're doing that over and over and over, and it becomes wildly efficient to prepare for client meetings.

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If you do that in the constructive surges where you're batching your meetings into periods.

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Now you're doubly efficient. Because now you've swooped all that into a much smaller window of time, you're doing it much more efficiently right.

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You're doing all that service model work we teach you so you're adding so much more value in those meetings.

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And now you have a whole lot of time left. And with that blueprint you can say to your team here's how we're preparing for meetings right.

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You can start to build those systems and processes to capture the information so that they know.

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Here's what we're doing this meeting season. This is the value.

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Add, here's how we're providing it. Crm is. Gonna do this.

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We drafted the letter. The data is going to go in like, okay, we're set.

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So, we won't get in deep into surges here.

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But it is. It's a leverage that you can pull on top of model client meetings to double down on really scaling time and capacity.

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A lot more efficiently. So here's the meeting process.

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Best practice so we're gonna walk through each of these steps.

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You're gonna schedule the meeting. If you're not using auity or calendly, that is your takeaway number one underscore because it's table stakes.

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And any time spent phone calling and emailing back and forth is wasted time and energy on everybody's part. 2.

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It solves all of the can you meet at this time that you don't want to meet, but I want to, because it's not an option on your calendar, and we have 80 year old little old ladies using this just as much as rate, 25 year olds like they're like the

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world has changed in that. People are used to this. Now, everybody's dentist and doctors office uses these.

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So how do we schedule that? Typically, we'll have you do that 6 weeks out you're gonna send a reminder to schedule email 4 weeks out.

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You're gonna to call clients that have scheduled 3 weeks out.

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You're gonna send a reminder to schedule email 4 weeks out. You're gonna call clients that haven't scheduled 3 weeks out and you're gonna send the meeting confirmation letter on Sch.

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No. Should you not in the ideal? That's factory work.

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Anything that can be modeled and repeated is factory work how much do we get paid for factory work?

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\$50 an hour. Can you build a 1 million dollars 100 day off practice doing \$50 an hour work?

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Not. Really. I have not figured out the math. Right? What is your job is to do the focus work?

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It's that 1,000 plus an hour time your job is to think of, and when you get paid to think the quality of your thoughts matters immensely.

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But so does the quality of your process, because that's the only way you're freed up to think so.

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If we can do that, then we could get into preparing so that's where we've got our core agenda.

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Go back to that service model lesson if you remember the wedding cake.

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Right? What's the standard stuff the things we're talking to everybody about?

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Right, your value, your value. Drop if you will. Hey? We're covering Ross with all of our clients this season.

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Right? Okay, hey? We're covering beneficiaries with everyone.

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It can be the same stuff. It might be something really specific and technical.

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What was it during Covid?

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Was the tax law like, Hey, we're gonna talk to everybody about right?



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What's happening in the tax changes and how that's gonna affect you.

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So that makes it easy to prepare if you have subsegments the clients, business owners, and non-business owners, can you now modify that agenda a little bit accordingly, and prepare really efficiently sure you can so the goal here is to review the client situation there should be a

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model agenda. Hey? We're covering. Are we doing any standard stuff?

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Is there anything special we need to cover? And then what's the client's personal situation?

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Is usually the top of that wedding cake. So 4 weeks out, you're gonna have your meeting process where you sit down and you say, is there anything special about the client situation?

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You're going to great teams going to prepare those agendas.

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We're gonna send them to clients 2 to 3 weeks out.

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We're gonna ask them for feedback. Why?

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It's their meeting the number one thing that we'd love to say in these meetings is, Hey, this is what's on our agenda what's far more important before we get to anything between our last meeting.

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And now has anything come up, or changes, or anything really important on your agenda today?

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And if they say, Hey, actually, we just found out Mom's going in a home like that is the death to the last, like whatever you thought you were going to talk about is gone.

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How many times does that happen to you? What if we just ask in advance?

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So one of my favorite stories is, we had a client do this literally, he said.

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The client said, We just mom had a stroke.

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We found out, we're probably gonna have to put her in a home.

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So because they have the model client meeting process in place because they reached out.

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They had this information 3 weeks in advance. Maybe it's 2 2 and a half by the time she answers, and then what do they have the opportunity to do?

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He sits down with this team on their ongoing weekly meetings, and as it comes up, bless you!

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And he says, Hey, Jane, what I want you to do is I want you to look up homes in her area and in our rate her daughter's area.

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Our client, and I want you to get the price for low median and hyp-pace Point homes. And we want to run those projections to see what the impact on the plan is going to be, because we know the spouses aren't kicking in.

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So the client comes in. They sit down, and what's the first thing we start talking about? Hey?

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We've got a lot of stuff to talk about today, but you shared with us what's going on with your mom, and that's really the most important thing.

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And so we took a little bit of time if it's okay, we want to talk to you about.

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So when you're going to let her talk about it, the personal part, and then it's Hey!

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We went ahead and we did this, and she was blown away.

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He was like we ran the projections here's what it's going to mean.

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If you pay for all of it, you pay for some of it.

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Here's and she was like.

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Got like 4 or 5 referrals that year. Why, what was happening in her life?

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Her mom was going into a home. What happens? That's a tax on you.

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Who do you tell everyone who will listen to you? Oh, I gotta do this again like oh, so what happened?

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Every time she had that conversation.

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My adviser was so great when this happened, and right like every hour she got.

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She was like my adviser was so great. They ran the numbers before I even walked in the office and told me how we could handle it.

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Jude. It was so scary I was so. It was just so great to have them there.

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I want one of those like. That's the power does not mean that's gonna happen every time.

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It's not but what's the number one job? Right?

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Can I count on you first and foremost, to see me? Hear me and understand me?

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You can't possibly pretend to do that. If you didn't bother to ask what's going on in my life, now I know you're gonna ask that at the beginning of the meeting.

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But that is ripe for surprise, so it might be like, Hey, great!

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Or it might be like and I don't like.

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Personally, I I know it's coming.

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So that's that simple thing can actually put you in a position to add so much value, because if they have an issue, and there is an ounce of work that you can do related to it.

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And you do that, going into the meeting, and you have it ready.

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You look like a boss.



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And they're gonna be like, Wow, you are on top of it. You are prepared.

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You have like, they're not even gonna like this guy's got a process that's just so great.

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And then what did they come to get used to? The emails?

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Gonna come and they get better and better at like. Think we know she's gonna ask where we go again, and it seems like we're like, Okay, we got this.

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So these little steps, if we can go back to the slide, start to make oops to go back one.

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Start to make a really big difference, so you can read if you have cois.

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This is where you're going to do the touch point like, Hey, we're going to be meeting with Bob and Jane.

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No one does this. We just wanted to check in and see if there was anything happening on your radar.

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That we might not know about.

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And if you surge by the way, they get used to it, and then what you're going to do is you're going to have a call with that Cooi to talk about all of the clients that they've referred to you at once, because it's efficient we're batching

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again, because they get used to it. And they're like, I'm gonna get 5 letters.

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And it'll be like, and you're like, Hey, how about?

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We just grab lunch. And right so that's where the models like the schedules, get really public.

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You, if you know this is your meeting, and this is your meeting schedule, you can start to prepare for those things.



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So there's all these little side benefits that just spin off of having a good process right the day of you're gonna prep your meeting room.

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You're gonna have the meeting. We talk a lot about that in the sales process, and the one-page plan right?

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Adding all that value, you're gonna make sure that you greet them.

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It might be by zoom, these days. Right? You're gonna meet with them 75 min is the Max that you should need for an in person meeting.

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Barring a really big situation. 45 min like, I don't know about you guys.

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Are your Zoom Meetings just going faster. They tend to just go faster, because the small talk tends to cut down.

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Do you want to make sure you have a nice opener right to have that personal conversation in the beginning? Hey?

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What's been going on since the last time we met is just a really nice easy conversation so you just kind of get the story piece, and then you can dive into that agenda, and you just tend to get through it so efficiently then you're gonna follow up.

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So the meeting prep, which we'll talk about right? That's where what's going on.

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The agenda is what you're going to. The process. You're going to orchestrate with the team.

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Same thing with the follow. Up. We have the meeting. We update the one page pan one to 3 days later. Pick one.

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It goes out right and then you've got a system for what happens next.

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How orchestrated is this process now?

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Pretty, orchestrated. Now imagine that what's on that agenda also has.

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Its process for what's going to go? Think service model.



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What's going to go on that agenda? And this is the process that you dump that content into and say, Hey, team!

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For this meeting, where these meetings, if you're batching them.

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Video surge. Here's what needs to be on those agendas and then they go pull the levers to make sure that that's what's on the agendas, and then you'd have a process where the stuff from the last time, because now you have that really cool one-page plan or your

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software version of it you know exactly what you need to talk like.

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The team can prepare the agenda without you. So you're literally sitting there just going client file 15 min.

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Boom! Boom like it should take you 15 min to review that, and add your like all come in at the last minute, and put the garnish on top and that's where you're like, hey?

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By the way, Jane and Jack Blah, let's make sure.

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We add that to the agenda but what you'll find over time is, there's very little of that, because you capture it all as a function of the process.

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So what it really decides is when you have a process and 2, you decide what's going into those meeting agendas in terms of are you doing that 3 tiers of the wedding cake?

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Are you using the one page plan is this agenda right?

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How are you? So that's really where you're going to focus on the technical piece of what you're covering.

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Again. You're gonna schedule 6 weeks out. You're gonna have 2 to 4 weeks to prepare. And then you're gonna have a test drive.

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So if you're surging right, you're gonna go through everything.

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If you're doing them one at a time every day is the test.



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Drive? Does that make sense? But the idea is, you wanna make sure like, hey? Is everything ready?

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Are the files ready, or the agendas right? Is the office, or the zoom, or the background?

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Is everything exactly the way that we want it to be.

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Old meeting agenda new meeting agenda. We just for those of you who are in the one-page plan session.

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We just talked about this this morning. Right? This is drawing from our good friend Carl Richards.

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Things you can't control is what we tend to spend a lot of our time and energy on.

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And we want to shift these meetings to the things that we can.

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That's the one-page plan conversation. However, you deliver that conversation so that is the backbone of this process.

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What we also want to do is shift those we talked about this a lot in one page plan and say as process, we want to shift the percentage in the ratios by which we spend our time.

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We spend a lot of our time talking about products and processes, and last time talking about the plan is we want to switch that right.

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So you've heard a lot about that in terms of hey?

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What's important to you? What are the things we need to account for?

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How does that feel to you? All of those things are designed to get people into the feeling state?

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Where does trust happen?

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Head or heart.



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Hard. Do you meet people? And you just feel like you trust them and you meet people, and you instantly are like, hmm, now your brain will kick in and tell you if you're right or wrong, but what you're trying to do is create connection with people.

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Through this process, which is why all of those conversations about the math don't tend to do it.

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Now again, you have to cover the technical piece. They want to know that you know what you're doing.

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But the goal is really to get to a place where you've mapped out a meeting that hits everything you need to hit in the timeframe that you wanna hit it, and you know that if you follow that meeting model it is high probability 99% that is going to be a really good

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meeting, barring any drama that people drop in them, and that does happen sometimes.

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So what's the model for that meeting? Look like, Carl?

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And I sat down. One day, and like we did the our version.

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And then I was like Carl. What's your version?

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And it's right like 10 min, and then 50 like.

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The difference is, Carl's not segmenting out right.

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The statement of purpose is gonna hit on things like, Oh, we're probably gonna need to up the insurance if we're gonna do this so that like it's coming up in there, it's not just 50 min of fuzzy conversation.

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But the way I like to do is you look, you're gonna have 0 to 5 min on your opener for some of you.

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That will be 10 or 15 or 20 min. Given your client relationship, you might spend half the meeting shooting the shoesmen.

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That's okay. As long as you get through everything else.



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And rate, and that works. But the goal is like, try to pick your window so that you can start to manage to time. Hey?

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You've got about 5 to 10 min to get through the warm and the fuzzy.

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If something really big comes up right then you're gonna be able to come back to it, hey?

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Thanks for sharing that. It's not something we had on the agenda today, but it seems really important to talk about I'm gonna go ahead and make a note of that, so we can cover it once we've gotten through the other things does that sound good.

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Yeah. So you don't have to stop in that moment and take the left turn.

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You can absolutely pause and come back to it. And that's gonna just depend on that significance or severity of the issue. Right?

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If it's a little deal versus a bigger. My agenda, your agenda literally, that is the hey?

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Now, if you've sent the email out in advance with the agenda, you're going to frame that languaging.

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It's going to be like hey? We sent out the agenda in advance, like we always do.

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Didn't see anything special on there just wanted to check in.

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Here's what's on you can see what's on our agenda today.

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Just wanted to check in with you. Is there anything special that's on your end?

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Nope, okay, great. So that might take 60 s. It might take the whole meeting, depending on what?

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The answer to that question is again, that shouldn't happen, because you're not going to be surprised unless it happened between the time they sent the email and the meeting, in which case they're probably gonna tell you.



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Anyway, cause they get used to it like, Oh, they're gonna ask.

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I'm just gonna give them the information then we like to go into personal discussions.

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Goals, changes, challenges. This is the what has our attention right now, what's going on?

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It might be technical, like Hey Covid, happen you've got a business we're gonna need to talk. Ppp.

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It might be something completely personal. Right? So that's where the individual circumstances are going to really kick in.

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What has their attention right now is always my favorite question, or some version of it, because what are they?

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Gonna tell me what has their attention right now? And if it's the market, I wanna know if it's their relationship.

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I wanna know if their kids are driving them crazy. I wanna know, because that's where trust equity is.

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Built right when I know it's important, when I'm really peeling back, and I'm getting them to share things.

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So progress, review. Hey, let's take a couple minutes and just check in on where we were last year, where we were 5 years ago.

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Like this is where you're gonna again use your judgment and discernment relative to the client relationship.

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But I love to build in progress reviews. I don't know why people don't do this more every so often.

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You should be saying, Hey, let's like as we kick off today's meeting.

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Let's look at where we were 3 years ago. Hey, we were here.

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How does that progress feel to you? Right, hey? Is anything change like 3 years ago you wanted this is that, you know, based on everything that's happened.

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Hey? We went back, and we noticed we got that \$30,000 error that your accountant missed.

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Glad we caught that right? So it's a very quick way to just go back and say, Hey, here are the things we've done together.

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And then you can segue into right. Are there any other things that we want to start doing together right?

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So it can be a really cool conversation. Next 20 min is, gonna be right.

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We've got some functional stuff to cover. Am I on track?

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Is there a portfolio that we're going to do review?

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Is there a market conversation that you want to have? There should not be 50 min of the 60 min meeting right?

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But this is that place where you're gonna have those conversations as appropriate to have them.

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You're gonna reinforce that you have a disciplined approach so you're constantly ceding the messages all the way through.

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Next is, gonna be your client value, add, or if you do, those but we have to like to call them value drops.

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Now which is basically you're picking a topic to cover unilaterally with all clients.

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So I realized that my advisors were doing this like 20 years ago, where I was sitting, we would fly up because we met in the spring and the fall, and we did one of them in person, and we did one of them by phone, back in the day and they had like a nice deck on the wall, and they would

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go through things, and I don't know. I'd been consulting for a few years.

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So I was like, Do you guys do this with like, just this deck?

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And they were like, Yeah, like we pick. And I was like, Oh, okay, that like, I didn't.

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I wasn't offended by it in any way. I just thought oh, what a neat idea!

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Where people should do that. So you're picking a specific topic.

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It can be one of those standard things like, Hey, every couple of years we really want to go into beneficiaries and make sure we've crossed all the teas and out of all the eyes.

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Here's a two-page printout of every beneficiary we have for you.

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Let's take a quick look at that. Make sure it's okay.

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You know I love to do stuff like that in those automated ways, because I don't think that's the highest value conversation that you can have.

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It might be something else. So that's where you go to that service model.

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And you look at the I don't have a marker.

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Oh, you're here! You look at the wedding cake standard stuff!

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I like to just call this the Cfp stuff right?

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Every client's gotta have. I have a little trademark there.

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I did right there I did see a P stuff right? This is the beneficiary.

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Review. This is the easy stuff. This is easy stuff to put into that automated who we're going to send a spring cleaning email every march that says, Hey, it's time to make sure the house isn't order. We're crossing the Ts and dotting the eyes.

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Aren't we so awesome? You get a ton of credit for that in that format that you get almost no credit for it in a meeting.



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So look for those things. Then we've got what I call the specials.

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Like Adam's clients, are optometrist.

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He looks radius quarterly meetings to look at their business rate.

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If we can create more cash, flow, that cash will come into the wealth plan.

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That's a really good thing. So he might pick one of those topics like optimizing cash flow, you know, improving your revenue per employee.

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Like it could be something technical. It could be something completely else.

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It's gonna be specific to the client situation. And if you've got multiple segments, this is where this is very helpful, because you might have one for little old ladies and another one for business owners and another one for someone else.

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So you're still gonna do duplicate work.

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But you're still gonna do it as efficiently as possible.

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And then up. Here is the personal, and if we build this meeting agenda right, and we follow that process, then we've picked something.

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And then, really, as you can see, most of the meeting is about the top of the cake, or how we're applying these pieces to their situation.

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So you don't have to do a tiered model.

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You can literally just take your stuff, put in a service calendar, decide right when you're gonna have those conversations will get a lot more into that deeper inter of the service.

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Model. But just understand, anything can be a value drop.

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Like beneficiaries, is pretty boring, but I turned it into like, we're such a big deal.



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Look at us. Gotta print out. We've done it, hey?

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You just grab that highlighter and highlight anything that doesn't look right anymore.

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Okay. Great. If so, this is what I call a surfacing strategy.

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When you cover by email, in person, by phone, by zoom, by loom, it does not matter if you cover a topic with everyone.

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What is inevitable, how many of them will need to go deeper in that topic?

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A small percentage typically so what you're doing is you're mass servicing.

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I say that with absolute love I am the chef at French laundry, but I am specializing the piece that shows up for them, because it's surfaced through the process.

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The process is said, Hey, actually, we're not sure about my sister being the beneficiary anymore.

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Just yeah. Natalie, bad example, or the trustee anymore.

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Oh, okay. Oh, where's Michelle? Michelle?

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There's the conversation. What changed? This is a really big decision.

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What's Michelle gonna get? In that moment the story now like, now I know stuff about like more trust equity right?

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More being that valued partner and listener. If I surface that in those automated campaigns then I could just block time for those calls, and you can click a calendar link here.

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You're just going through that with everyone. So your presentation might be generalized. Hey, this is what's happening with covid-nineteen here. You're just going through that with everyone. So your presentation might be generalized. Hey?



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This is what's happening with Covid or Ppp. It might be specialized right? They have an printout that has their specific information on it. It's going to depend on the value drop that you decide to use so if you're new and you're implementing model meetings and feel free

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to start at the beginner level of just have a model client meeting when you've really got that down, then you can start to be like, Hey, how do I want to layer value?

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Adds right in my service calendar, or into my meeting, and then you can start to break apart that service model.

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But I would just, if it feels overwhelming. Don't start with the value.

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Add, but once you get the process down it's just one more part of the meeting.

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Prep like. Oh, pull the file, print form! Here's the value.

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Add you build it once, and it's done for everybody.

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They're really cool thing about that is, when you cycle back around to that value, add in a few years what will happen?

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What will you have you've built it. You've done the work.

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Now you just click a button, and it happens so you're literally eventually with those value drops able to go through.

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You're going to look through your services and like, what can I do?

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There! And then you start to build them, and eventually you have a portfolio where it's built, and you're the chef, and you're like, how's it going?

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Yeah, that looks great. Thanks. I'm going to show up, and I'm going to deliver it and take credit for it, which is usually how it goes in restaurants.

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Right? So does that make sense from a structure and an organization perspective.



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And then the last part closing questions, summarizing key points, confirming actions.

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Hey? Really great to connect with you and Jane again today we covered a lot.

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Here are the things that I heard you say that I think are really important to make sure that we capture.

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I heard you say that Mom is going to be going in a home, that the math looks okay.

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But you're really worried about right? What's the toll gonna be on the family?

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Here's right. What are we gonna be here to help support you through that?

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If you need any more resources, we've got some you know, family therapists or coaches like just break those conversations can go anywhere.

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They can be like, Hey, we're gonna run a new policy, and we'll have numbers for you next week.

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It doesn't all have to be touched. You're just summarizing the meeting, I call it keynotes, and next steps, and you want to consistently see the value, hey?

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We confirm that it's real. Still, really important for you and Mary to retire on this date at this time, like, Okay, great like, you're going back to that one page plan.

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And yours, essentially, reading it with them. Does that sound about right?

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Did I get? Did I capture that correctly? Were are those the words that make sense to you?

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Yes, yes. Okay. Great, hey? As we leave the meeting, are you feeling clear?

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Are you feeling focused you feel like we have a plan.



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Yeah, we do great thanks.

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Now I orchestrated that intentionally you can change the times.

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You can change the topics. I don't care as long as it works, and it creates a great experience for the client and it gets the outcome that you need.

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So as we like to say around here, road, rip off and deploy, go eat it, tweak, hit, play with it like how it but the goal is to know what the meeting looks like before you ever have the meeting.

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And it's gonna be pretty consistent from client to client.

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So how do we talk about that? You're doing your plan and portfolio review right?

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You do actually do a little bit of that in those meetings.

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So you might just say something like, Hey, your plan is right.

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A 7% rate of return. Historically, right? I don't have to read it all out loud.

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Great? Does that range still make sense? Are you still feeling comfortable?

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If they say yes, everything's good. Do I need to spend 25 min talking about the portfolio?

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Nope, if they have issues or concerns, will they tell me here?

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Yeah, stuff. The market has been kind of volatile. When is this gonna stop?

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Great question. I don't know. I left my crystal ball at home right so notice that we're asking really well placed questions. They're intentional.

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And so we're surfacing, doing I need to have that deeper conversation here.

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Is there an issue around investments? Is there a discomfort?

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Is there a lack of clarity? Are we all good?

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And if we're all good, do we really need to stop and drag them through?

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20 min of looking at the portfolio. Is it?

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Gonna add value? Is it gonna to have impact when they leave that meeting?

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You're gonna be like, wow! So glad I reviewed those pie charts.

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It's what they get out of it, which is everything is okay.

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Which we can give them with far fewer pie charts.

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I think we all agree. What are some of those updated conversations points? Hey?

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What's average like, hey? There's no such thing.

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Dips always feel worse and real life, than like all of those things that you're consistently do.

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You have those conversations ready in your pocket like a toolbox like oh, this is Gary market conversation!

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Here we go! Hey, Bob! Great! I don't have a crystal ball if I did, I'd be making more money than I am right.

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Our job isn't to have a crystal ball.

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Our job is to rate be a guide. We don't predict the weather, like all those great stories that we tell that's where those stories come in so you wanna make sure that you have all of that for those of you that have other advisors.



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You definitely want to make sure that they really understand? How are we talking about the plan in the portfolio?

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How are we talking about? The not just like, because what they tend to do is talk technical.

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Thank you. Remember the story yesterday about right? I want. I want to sell some buyers and travel the ocean.

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And it was a great what's in your 401 K.

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I was like oh, she's just a missed opportunity.

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It doesn't mean you won't get the client. It doesn't mean they won't have a good client. It doesn't mean they won't have a good relationship.

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But is that a missed opportunity it's galactically huge, because if I give 7 s, if I can sit in that space and say what she said was meaningful and personal, and she leaned forward because you know the reason that you can do that by the way which is why it takes younger advisors right or

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less experienced advisors. Time is, what's your energy doing when you have a model meeting, and you know it like just cool.

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Where's your energy? Wherever I want it to be?

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Anyone implemented surges. Right? What happened the first time you do surges?

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Oh, my God, it's so much work right, because not only are you doing the actual work.

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What are you thinking about constantly? Oh, my God! How am I going to do this?

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Is it going to work like? Is this agenda set up like you're like all of that energy after your second or third round of surges?

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You're like, all right. We know the drill. We're gonna make some tweaks and a wait you get all that energy back.



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So I remind people all the time with surges like one surges.

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Right? You're gonna really condense your time. But the first one or 2 really be prepared for that big.

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You're gonna feel really depleted because your brain is using so much energy just going like this is such a in your mind, such a radical change like, I gotta make sure it goes okay, after the third time.

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You're like, what?

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Like leather rins, repeat like we know the process.

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This is why we systematize and automate solar and your practice, because you have now confidence in outcome that requires little to no energy.

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If I'm in nature, that is survival skill number one, because in nature I have to use energy to survive right?

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So what we're saying is we're gonna invest our energy on the front end by building the model meeting the bottle agendas.

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The value adds the systems and the service models. To put these pieces together, and that is some real work.

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By the way, you're going to have to put some effort into it.

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But once it's done, what happens, you get that lift.

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That is so additive, because now you've baked in that cost, it's there into perpetuity.

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You get to pull out the value. Every client meeting you ever have.

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You're getting a return on that investment like, here's another 100 bucks.

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Here's 1,000 bucks, because you've done that work.

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It's not the most sexy work I know. You don't get excited about like I'm going to go back and build my model client meeting agenda but you know it's really sexy for me.

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Results, for self span there. So was that's the goal.

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So we can talk through that right? The client value adds views on markets, not performance, like educational updates.

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The Cares act, tax planning, finance, 101 for your kids like you can pick any topic.

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The biggest question we have is, what topics should I use?

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All of them right. Doing a State planning review. Do an insurance review, do a Pnc review like?

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So at the bottom, because that's the simple stuff. When you get really good at it.

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Move your way up the ladder and start doing more complicated stuff like, do a spring cleaning email, or just do spring that spring cleaning is part of one of your if you want to start with.

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That's a pretty easy one to do. It's really hard to mess up.

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You're just pulling right beneficiaries and trustees out of the system.

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But it's a really good practice one. So again, a lot of things that you can do here handouts, etc., tough talks in client meetings.

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Client has an issue with performance. Their spouse isn't engaged.

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There's spending more time than they should are spending more than they should.

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That's always a popular one. They're not following it like these are the issues that you really deal with.

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The model client meaning is not going to solve these issues.



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What it's going to do is give you that track to run on, so that when these issues come up you have all your energy and presence to be like, okay, I got this how do I sit in this space and then you have right?

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There are scripts for every one of these conversations in the toolbox.

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Hey, Bob? Right. I don't have a crystal ball to predict the markets.

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Much smarter people than me have tried and failed.

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What we generally believe is the value that we can add is, where we put that in the script.

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I wrote in an art like there's lots of those like.

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Just sit down and ask yourself, what do you want to say?

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And then figure out the nice way to say it, and then say 35 times out loud until it rolls off your tongue like here.

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Thank you, Planon. Like your middle name. It's not even after lunch at you guys.

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Right, and then the biggest thing here is, how do you get back on track or you gotta come back to that model client meeting agenda so if client's like, I always want to talk about the markets are down and I don't like this and it'd be like great Bob really appreciate that this is

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a concern I can understand that with what the markets are doing right now we're gonna cover that as we get into the investment portion of agenda.

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But I'm gonna make a note of that, because I can see it's really important to you if you sense that Bob is really stressed out, you're going to stop you're gonna stop right there.

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And you're gonna say, Hey, we've got a lot of stuff on the agenda today.

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But my number one job is to make you help you feel good about your money, and I can see that right now.

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You're not feeling really great. What's going on.

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I hate the markets. I hate to go. Okay, hey? Remember that conversation we had back in the beginning.

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Yeah, this, this is that moment. Remember, when I told you that my job was not to predict the markets, but it was to sit here next to you as a partner when they go up and go down like I'm right.

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Think of Adam's pilot story. I don't know when the storm is going to hit. I just know that it is.

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That's why I'm here. For the moments like this, to make sure that we stay grounded and clear.

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And we're making decisions that align with the plan even when it doesn't feel good.

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And then you can decide, are we good, right? We just, you know again.

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But like, are we good and we can go on, or do we need to really create space for this conversation?

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Because if that's in his mind, nothing else on your agenda matters, he's gonna hear, want, want want?

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He needs to leave feeling good, or at least good about his choices going forward.

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So that's why it becomes so important to have this process in place and have the tools in our toolbox to pull them out.

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Oh, this is a hammer! Conversation. This is a saw conversation. This is a nail.

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Conference. I got it because let's be honest. Those conversations aren't new, and they're not unpredictable.

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We know they're coming. We just don't know in which meeting we don't get to predict that part.

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Like everything else, we just know there's a Flex section that says at some point one of those things is going to show up at my meeting.

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Should I account for it in advance? Yes. Do tough questions.

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Happen? Yes, therefore we should account for them. How do we account for them here?

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We right? Right? What's the honest thing? I wanna say, let's write the script.

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Let's practice it until we're ready to deliver it.

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If you do that it will be baked into your brain so that you can actually pull it out of the toolbox.

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In that moment. How do you stay on? Time?

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You have to have a clock, and you have to pay attention to it.

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This is the hardest thing for me, because I get so present like when I am talking to you.

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I am to like Leona at some point, will walk up a tap in 5 times like, and she'll be like, I'm really sorry I have to take her now, and I will like be walking as I walk away.

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I'd be like talking like, Hey, yeah, like, okay, I think this is not a joke.

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You guys know. Cause I like this is my like. This is why I'm here.

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Like I want to be engaged. I don't get to see you like every single day in my office right?

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This? Is it the problem is, we have this thing called schedule and I've had you like I call it task and maintenance like you've got to really be like, I'm so engaged.

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I'm really, and it's like, and what time is it?



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And I gotta do that while paying attention to all of you.

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I'm getting better at it.

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Time matters. So again, it doesn't mean you're gonna go through that agenda exactly.

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Have I? If you know that you have 5 things to cover in about that amount of time?

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Are you gonna be able to be like? Am I on track?

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Do I need to speed it up or pull it back? Hey!

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We're about 3 quarters of the way through the meeting, and I can see, because we spent so much valuable time talking about what's going on with your mom that we're not gonna get through everything on the agenda.

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Can we just take a couple of minutes to regroup?

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Look at here and let's see what you want to talk about today, and then we'll schedule some follow-ups, for after this meeting, not I'm gonna meet with you for the next hour and a half to chug through it all.

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For which they will thank you.

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Right? So that's the goal. How do we stay on time?

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I have on my desk. You guys have seen the big egg timer that's literally what's required when I'm in my office, because 2 big monitors, the clock is like that tiny and gray.

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I literally can't see it when zoom is up.

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All the offices in my loft are angled, so I have no place for an actual clock, and I was like, I have got to solve this problem like I'm staring at the screen.

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I'm looking at you guys. And so I got a big egg timer it's and it's got a big blue circle on it, so that no matter like it's visual, which I'm super visual, and I can see it.

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And my brain instantly knows. Halfway is 30 min. There's no like 2, 20 sevenseven equals 37 min to go.

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That's really hard. By the way, when you're like you're trying to talk, someone's giving you a big problem.

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They want you to solve it and your brain has to calculate exactly how much time you have to do it.

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Simultaneous to answer in the problem so that's where for me, that was just a I was like, I need something that I can't mess up, and I swear if they could put that egg timer on top of that little box back there perfect so I have to watch this little clock says I have 17 min.

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For this part, but notice, I am now constantly watching the clock because it's not great if I jam all the content in, or I don't get to half of it right.

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So that's where we've just got to really learn how to pace ourselves in those meetings. Notice a couple of times.

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They've given you a strategy to control the timing just because the client drops something into a meeting doesn't mean we have to right drop the bomb on the meeting and just dump it.

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It can be. Hey, this is really important. Let's take a couple minutes to talk about it.

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Now and we'll schedule a follow-up meeting, hey? This sounds important.

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Let's go through the rest of the agenda, and let's allocate some extra time at the end.

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Is that okay? You're owning the meeting which is very different than I'm going to sit down and talk until it's over and everything is covered.

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You see the difference that's the shift that we're trying to make on the follow-up. You're gonna do a meeting follow-up. It can be the one-page plan.



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It can be notes right. Adam's got e-money.

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You just want to clarify keynotes and next steps, so that they know that you and they know that you've got it.

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They can count on you to keep everything on track. This should be highly automated.

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This should not be you sitting down and waiting a third minute email every single time.

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That doesn't mean that wouldn't work. By the way.

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But if you've got that set up, or if it's your one-page plan, your problem is already solved.

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Right. You've got a template email for each meeting.

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If you're doing surges, you change the a little bit each time, and it's like, Hey, great meeting with you so glad we could talk about the things that are really important if you want to get really fancy.

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In your Crm, right? Boom! Boom! Boom! Bullet point 1 2 and 3, and it can insert those points.

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It's not even required, especially if you're sending them.

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The one-page plan okay, here's the one page plan.

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It reflects everything we talked about, and the key next steps.

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If you and Jane could take a look at it and let us know if there's anything that you think we missed or if you've got any questions about the work that you need to do, please reach out.

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And let us know right away are we on the same page?

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Yes. So it's a very simple step. But it's one that most people either overdo or underdo.



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They're going to send you 6 pages of notes that covered everything we talked about.

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Who reads those I don't. When I get those from my adviser which I keep telling them, stop sending me big notes.

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Part of the process. What do we skip to now? The bottom?

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No, it's a next step. I love them. That's just something they like to put all the notes in there.

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I'm like you do it. I know what I talked about. I was there.

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I just wanna know what I need to do now.

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But what are we trying to do with all those like? We got to make sure that you know that we know every like dude, put in a one-page plan, and I am your people, which is what I now get?

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By the way. So there's the template. Your model meeting schedule and literally, you're just gonna take that template and you're gonna start to orchestrate.

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How do I want my meetings to go how do I want my meetings to go?

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How do I want to spend the first 5 min? Hey, Michelle, what are those 3 questions that you have in your back pocket that you can pull out to get to?

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What's important to people that you have in your back pocket, that you can pull out to get to what's important to people that you can use consistently.

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Hey, when you get how are you gonna open that conversation? So the idea here is, and it's all in the guidebook, in the form is, it's literally just a circle.

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And you're just gonna decide how you orchestrate your meeting here are some of the resources that go with it right?

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There's a client review. The forms, the letters, the samples, the surges.

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It's all in there again. You're going to pull out the pieces you're going to ride it rip off and deploy.

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We have no ego here if you don't like it, change it, just get started.

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That's the important part. Alright. So again, lots to watch, read, apply, and act on.

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Here is the code, and then we're going to do.

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We're going to spend a couple of minutes working on your worksheets.

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Do you guys have a piece of paper in a circle?

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The answer is, yes, everybody has a piece of paper, and you can draw circle alright. Did everybody get the bar code?

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Wanna make sure breakout.

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So I'm gonna take some questions. But I want you guys to take a couple of minutes.

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And if you were, gonna build your model meeting right now, I can take.

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I'll take questions you don't have to define it.

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What would it look like? Based on everything you've learned so far?

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Question?

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Great.

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Okay. Can you hear me? I've been breaking up my search meetings in the 2 meetings, which is like the first being an intake where I'm asking a lot of questions almost read discovering things, and then a second being up presentation and based on that first discussion, creating an

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agenda specific to that second meeting where we can re forecast plans, talk about plan enhancements, and I guess my question is is that how so are you describing it?

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So are you saying that for every surge you have 2 meetings per client, that is what I'm doing right now.

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Okay. So I'm about to make you like 50% better.

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One meeting. So you're not going through the sales process every time, like what's like, you're just baking it into the meeting cause you've already done that work.

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You've established that Territory. Now you get to roam through it like, Hey!

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When we went through this, when we when you first joined us.

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You said this was important to you. It's been 6 months since we met.

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Has anything changed? That's it. Yeah. If something changed, they'll say, Okay, like the technical piece.

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You should already know what's on the agenda right that part is not a surprise.

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So that's where you're owning the relationship this is where you go back to your service model.

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And you, Matt, like, here's what I'm covering for these clients by type and segment.

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And here's when I'm covering it. So service models used to be A, B, C, d.

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One meeting, 2 meetings, and I'm like, Oh, my God!

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That's so. Archaic, like rubbing sticks together in a cave like the world is over here doing like wedding cakes and fancy stuff, and so that's where you really just want to make sure that the functional pieces are already baked in and you've got a process for that and then you're just sitting

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down and you're covering both sides in that, using that one.

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I think that goes back to the time like, do I have enough time thing where I know if I have 2 meetings I can maybe keep the first one to 30 or 45 min, and the next one to 60?

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But then I'm also asking for the client's calendar again, and there could be some semantics.

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How many times so are you meeting with them twice a year, twice a year?

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Yes, okay. So if they, assuming they take me up on that, how many of them take you up on the offer?

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Of say, our 80 households, like 60 of them, pretty much.

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Take me up on the springfall. The other 25% are.

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That's a lot of meetings like, yeah, thanks. We'll see.

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So what will happen is, clients will opt out. They're not gonna meet every time right that some they'll skip one and be like, Hey, we're okay.

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But the idea is to have that process so you just you're over doing it in that you're having one whole meeting to talk about how they're feeling.

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And then basically redoing the plan for the next meeting.

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We just are assuming that the plan is okay. Here are the things we need to talk about.

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And then I'm going to qualitatively sit in the space of doing that other stuff it's not like. Here's an agenda item.

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Let's talk about how you feel. I really need to know, to connect with you is not on your agenda right?

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We're just showing up and doing it. So if you use the one page plan, it gives you the framework, hey?

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As we kick off this meeting right, the whole white has your attention.

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Hey? Everything's great, all right. No problem. Last time we met these were the things we were sort of.

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Has anything changed anything? Come up? Nope, everything's still the same great. Okay.

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Here's what we want to talk about today. We're gonna do a plan review.

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Great. Okay, like, you might be super efficient. That's okay.

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But we don't need to re-plan every time we have the client meeting.

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So that should be like you should have half as many meetings going forward.

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Yes, sir.

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And we've got some virtual questions. All right. Real nit picking question here when we're do surges for annuals, and January send out all our requests, and then our semi annuals in March and September.

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We send out the surges via email personally, and then if they don't respond, we just put them down for next time.

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We don't do phone follow ups and honestly put them down for next time. We don't do phone follow ups. And honestly, part of it's because we have so many damn clients that we're kind of thinking if they don't respond clearly they're not that interested.

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Do you think that the phone call is that important? Well, I do like to make sure you don't have to.

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It's super easy to do. I like to make sure that you're meeting with clients on some like, if you haven't come in in 2 years like.

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So that's where I would draw that line and say, Hey, because to me there's a difference between a client and a customer.

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When you have a lot of clients, if you're not careful, they become customers, which is they're disengaged.

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They're just there. If they really need something they'll call.

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And so what you're trying to really fare it out is right.

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Who are those people that are really going to engage in this process really fully?

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Virtual questions. Catherine. Okay, Ryan Alder for asks, what are your thoughts?

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Stephanie, on having a referral script during the the model meeting.

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Great question, how do I love them? What is the number?

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One reason you don't have them.

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Don't want to. Why, we don't want to look bad.

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We don't want to get rejected. We don't want to be the salesman.

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This makes no sense to me. I just don't get it honestly.

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So someone as a prospect comes to you, and they're like Vincent.

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Here's all my money, every penny that I've earned.

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Can I trust you with it? And you're like, yes, if you give it to me, I will A, B and C.

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And you're like great. And then, like 3, 4, 5 years later, Vincent has taken the most important thing I have to maintain my life, which is my cash, and he has done everything, he said he would do.

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Hey! Delivered? I'm having a great meeting and at the end of it been since, like, Wow, I'm so glad that I could help you.

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But I'm way, too. Chicken Chisnette, to ask you to introduce me to somebody else after, so I can ask you for the money when you don't know me, and that you can count on me but I can't ask for a referral after you.

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Do? Does that make sense? No, but we don't wanna look needy when they called us?

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We're not needy when we ask, we might be needy.

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That's a story in our head. What if you just so strongly believed in what you do?

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They just want a script at the end, and says, Hey, hope you enjoyed today's meeting, you know you're out in the world, family and friends but you know we always love to be the first phone call.

01:03:58.000 --> 01:04:08.000

If there's someone we can help, please don't hesitate to send them our way. Hey? Let's take a quick look at the notes and next steps, like just right there, like it belonged.

01:04:08.000 --> 01:04:16.000

What I do not like doing. Please. I know there are people who teach this, and it will actually work, because it's a system.

01:04:16.000 --> 01:04:23.000

My least favorite way to get referrals is that piece of paper with 5 lines on it that you slide across the page.

01:04:23.000 --> 01:04:24.000

The table and say, Could you please give me the names of 5 people?

01:04:24.000 --> 01:04:28.000

You know, who know. Don't put me on the spot like that.

01:04:28.000 --> 01:04:37.000

I don't know if my mom or my dad or my sister like I'm pimping out my friends on your behalf like Don't put like. Don't.

01:04:37.000 --> 01:04:42.000

That doesn't mean you. It doesn't work by the way it works, because it's a system.

01:04:42.000 --> 01:04:43.000

So you can totally do it. You can do it credibly.

01:04:43.000 --> 01:04:51.000

I just think that there are right more dignified ways to ask for referrals, which is just to have the conversation.

01:04:51.000 --> 01:05:01.000



Hey? We love helping people like you. We spot, you know, if you know any other optometrist that have questions about their financial life, just want you to know we're always here right happy to be that first phone call. If we can help them.

01:05:01.000 --> 01:05:07.000

Great if not, we'll help them find the next best step, whatever it is, you know, if there's any information we can ever share to anyone like.

01:05:07.000 --> 01:05:09.000

If you any groups that we can speak to man, hey? Let me know.

01:05:09.000 --> 01:05:13.000

I love talking to optometrists about optometry stuff.

01:05:13.000 --> 01:05:14.000

It's how you say it. Notice the energy when I say it is, I assume that it's okay.

01:05:14.000 --> 01:05:22.000

I assume that I'm credible, and it's no big deal, and I'm just asking you to think about this.

01:05:22.000 --> 01:05:25.000

I'm not like good. And I'm just asking you to think about this.

01:05:25.000 --> 01:05:28.000

I'm not like, oh, could you buy this car right here for only 9, 90.

01:05:28.000 --> 01:05:30.000

That's how we feel right, or we're so worried.

01:05:30.000 --> 01:05:40.000

They're gonna say, no, don't make them so just find a way to have a conversation about how you can talk to other people if they have needs that you feel good about.

01:05:40.000 --> 01:05:44.000

And then absolutely bake it into your conversation every single time.

01:05:44.000 --> 01:05:48.000

Yes, Kathy, alright! One more in virtual from Joe Forish.

01:05:48.000 --> 01:05:55.000

The beneficiary updates are a great example. What are other examples of screen cleaning emails, beneficiary examples are great.

01:05:55.000 --> 01:06:03.000

What are other examples? Anything on your service list? I mean, literally, anyone ever do wills and trust reviews.

01:06:03.000 --> 01:06:05.000

Hey? It's time to do wheels and trust. Hey?

01:06:05.000 --> 01:06:15.000



What about I mean, what was the last time that you sat down and said, Let's look at your property and casualty insurance we had a client really cool, little tiny little idea auto insurance like, is your like, hey?

01:06:15.000 --> 01:06:17.000

What if we lowered your what if we raised your deductible?

01:06:17.000 --> 01:06:22.000

You had a \$1,000 to do something else with, like, like, it's a simple little thing.

01:06:22.000 --> 01:06:27.000

You will do that at some point right? Not for every client, but like that's not uncommon. Hey?

01:06:27.000 --> 01:06:31.000

We've looked at your plan. Your advisor was like, hey? Why is your deductible so low like?

01:06:31.000 --> 01:06:32.000

If you crash the car you can buy a new one.

01:06:32.000 --> 01:06:33.000

What if we took that money? And I was like Oh, my God!

01:06:33.000 --> 01:06:46.000

I've never thought of that simple little thing. Hey? We ran this, you know, if you, if you low, if you raised your deductible, you'd have an extra \$750. I don't know whatever. Hey?

01:06:46.000 --> 01:06:47.000

Is that something you wanna again? That's a tiny time.

01:06:47.000 --> 01:06:49.000

But I that's the point. You can pick anything it doesn't have to be some big, monstrous thing.

01:06:49.000 --> 01:06:58.000

Half of these things are things that you do anyway, and you get no credit for it.

01:06:58.000 --> 01:07:02.000

Now, you're not gonna do this 50 times a year or 12, right like.

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So, you know, like Chris, like he every month that things go out, he he wanted to drop a value, add in there every month he could.

01:07:07.000 --> 01:07:12.000

He could be like, I'm basically gonna do virtual planning. I run the numbers.

01:07:12.000 --> 01:07:13.000

Here's where you're at. Click a button.



01:07:13.000 --> 01:07:22.000

If this is something we need to talk about like you'll start like 10 years from now someone will be doing that like the technology is, gonna be that good.

01:07:22.000 --> 01:07:27.000

Your people are literally going to pay for some kind of community or subscription, and they're going to be like when I have a problem.

01:07:27.000 --> 01:07:30.000

I want an advisor.

01:07:30.000 --> 01:07:37.000

It's inevitable. Look at every other's like industry out there. You've got turbot like it's the way of the professional service firm.

01:07:37.000 --> 01:07:40.000

It is inevitable.

01:07:40.000 --> 01:07:47.000

Which is why our value has to be sitting in the space not necessarily right doing the stuff, so to speak, any more virtual questions.

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Catherine. Yes, we have Dana Jacobs.

01:07:49.000 --> 01:07:52.000

Should the referral script and fee increases, be a part of the meeting agenda.

01:07:52.000 --> 01:07:59.000

Item should a referral script on fee increases be a part of the meeting, slash fee increases.

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If that's the topic of your meeting, if you're increasing fees that and it's a topic of that conversation, then yes, I would not necessarily include fee increases in every conversation.

01:08:10.000 --> 01:08:12.000

I mean, if you can get away with that, go for it.

01:08:12.000 --> 01:08:17.000

Let me know how it goes, cause I I wanna copy and share with everybody.

01:08:17.000 --> 01:08:21.000

I'm not, did I? So is that I just wanna make sure I'm actually understanding the question.

01:08:21.000 --> 01:08:25.000

So yes, you can have conversations about ref you can have conversations about anything in your meetings.

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You just have to decide to have them every meeting period or right.



01:08:29.000 --> 01:08:32.000

It's hard when you're doing them individually.

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Another reason to think about surges, but surges are great because you can sit back and say what's going on in our practice.

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What's going on in the world, what's going on in the world, what's going on in the markets?

01:08:38.000 --> 01:08:39.000

What's going on in the market? What's going on in the law?

01:08:39.000 --> 01:08:43.000

What's going on with clients? What do we need to be bringing to our clients?

01:08:43.000 --> 01:08:50.000

Attention is season. Oh, you know we had this whole service calendar mapped out, but it turns out markets are crazy right now.

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So we think we're going to address that, hey? We've done right.

01:08:55.000 --> 01:09:01.000

A scenario analysis. Hey, everybody! We ran the analysis that said, if this happened for the next 12, whatever months it would look like this, hey?

01:09:01.000 --> 01:09:11.000

You're still okay. If you have any, or you're not call us, you might need to look at right putting changing the guard rules on your portfolio like you can do anything.

01:09:11.000 --> 01:09:14.000

Alright any questions in the room.

01:09:14.000 --> 01:09:17.000

You guys have reached your saturation point. I can see.

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Your brains are like we can take care of no more information any more questions, because I want it noted.

01:09:23.000 --> 01:09:26.000

I have an extra 1 min and 23 s if you don't have.

01:09:26.000 --> 01:09:29.000

Oh, Peter's blowing it for me, but I want it noted.

01:09:29.000 --> 01:09:36.000

I am officially done early, and now I'm using my minute and 26 very quick.



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Question the what's on your mind question. You put that in the prep.

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As the you know, part of the email, I think just to try to really generate or I just say, has anything changed? Or is anything that you want us to rate that you want us to focus on in the meeting and there they know what's going on in their life they know that their fight with their sister isn't

01:09:55.000 --> 01:09:58.000

making your agenda, and they know, hey, that you know.

01:09:58.000 --> 01:10:02.000

Bob, just decided little Bob, decided he wanted to go to Harvard and I think we need to have a conversation about that college fund like it's just going to be.

01:10:02.000 --> 01:10:12.000

Whatever the interesting thing is as you as you look at your clients, you're gonna take it and share personal stuff.

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It's gonna have nothing to do with the plan. That's pretty cool.

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By the way, when you get there because you're like, oh, they're just letting me in, and then you, your job is to sit, and that be like, hey?

01:10:20.000 --> 01:10:28.000

Does this in any way affect the plan? Hey? Should I be running numbers on something, looking at something like that's where your experience comes in.

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That conversation like, Hey, we're gonna have to put Mom at home.

01:10:30.000 --> 01:10:33.000

How many times have we done that? What did we already know?

01:10:33.000 --> 01:10:36.000

Like, here's that's a great analysis like long-term care analysis, hey?

01:10:36.000 --> 01:10:41.000

If you had to go to a home right now without long-term care, in the average geography.

01:10:41.000 --> 01:10:44.000

This, is what it would look like. We stress, test your portfolio.

01:10:44.000 --> 01:10:52.000

It's something you talk about in a meeting like it's not a big deal, but if you pull it out and you use it now it's available right now I'm dropping real value like Boom.



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You can't miss it. So that's where they value drops become so valuable and they're super efficient.

01:10:56.000 --> 01:11:04.000

I can mass service and personally surface. And then, when that client's like, Hey, I'm not sure about.

01:11:04.000 --> 01:11:07.000

And I spend 15 or 20 min on the phone with them.

01:11:07.000 --> 01:11:11.000

You were right there when I needed you. How did you know because I was the one that designed the topic and sent the email?

01:11:11.000 --> 01:11:16.000

Isn't that amazing how that magic works like you're like I can count on you.

01:11:16.000 --> 01:11:24.000

And when they start to get things again, whether it's in or out of meetings systematically. What are you telling their brain?

01:11:24.000 --> 01:11:25.000

I have a process. I'm disciplined. I'm concerned.

01:11:25.000 --> 01:11:26.000

I have a process. I'm disciplined. I'm consistent.

01:11:26.000 --> 01:11:29.000

When things go wrong, what do you want their brain to remember okay, I don't like this, but Peter has a process.

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He's disciplined, and he's consistent man like I can trust that right.

01:11:38.000 --> 01:11:51.000

We're building trust, equity, every place that we can little dip in the bank in the bank, in the bank, because what you know unequivocally is, you will be using them at some point in that relationship you want to build up as many as you can.

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So sending an email that says, I was thinking about the agenda in advance, and I have a pro like, it's saying all of those things will saying none of them.

01:11:59.000 --> 01:12:04.000

And their brain is like God. They're so on top of their stuff, which means what you're on top of their stuff.

01:12:04.000 --> 01:12:11.000

That is the most number. That is the thing everybody wants. They want to know that they can count on you to keep them on track and not mess it up.



01:12:11.000 --> 01:12:14.000

Can I count on you to have the right expertise? Can I count on you to have a good process?

01:12:14.000 --> 01:12:16.000

Can I hand on you to hire the right people? Can I count on you to have all the things in place that you can confidently answer the question?

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Do I have enough? Am I gonna be okay? And I can count on the answer.

01:12:24.000 --> 01:12:27.000

That's all theyaked into your model client meetings.

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Your value drops your sales process, and that's what we really hope to kinda kind of really crash here.

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At. Limitless is these kind of no cultural norms.

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We have, like, we have a meeting, and we go through all the discover intake.

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And when the forms filled out it's been a good intake.

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No, it's been a mediocre intake, cause you board the heck out of the person on the other line, and the whole like.

01:12:46.000 --> 01:12:52.000

But I need the information is not a good reason right? So what we want to do is challenge assumptions.

01:12:52.000 --> 01:13:12.000

Every step in the process so hopefully, the conversation around model client meetings, something that seems like mundane and boring and like you don't have a lot of agency over is actually a lever that you can pull to get really wildly efficient effective in your meetings technically and personally, and then you can do it

01:13:12.000 --> 01:13:19.000

in enjoyably, because it's going to take about 80% less of your time and you're gonna be like, oh, that's amazing.

01:13:19.000 --> 01:13:22.000

I get to show up and be the advisor, so does that make sense?

01:13:22.000 --> 01:13:28.000

You guys excited about model client meetings? All right.

01:13:28.000 --> 01:13:38.000



It's lunchtime. It is lunchtime and 25 min, so just be sure to what am I on the schedule on the previous slide to get your Cfp.

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Credit. What am I doing for the next 25 min?

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It's still 25, but it says 0.

01:13:48.000 --> 01:13:52.000

I'm 25 now. That was for your session, and then that's when starts.

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I was waiting, too efficient. I feel like we covered it.

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Do you guys have any pressing? If I went any deeper you're not gonna remember any of it.

01:14:00.000 --> 01:14:07.000

Anyway. Alright! Well, we have some time. Great. You asked if you were commenting there about.

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Asking too many questions.

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Right now when they schedule on calendar, we just what date do you want? What's your email?

01:14:13.000 --> 01:14:20.000

So you get. And I'm I'm wanting to add maybe a couple of additional questions.

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Cause. Usually what happens is then we'll prepare an agenda.

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Hey? Does this look good? The email back? I'll add this also.

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But we could just include that in what would be too much.

01:14:32.000 --> 01:14:37.000

As I mean is, is it appropriate just to ask what's on your mind?

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And then like Well, who is your well, first of all, are your clients engineers, or are they me?

01:14:41.000 --> 01:14:46.000

Cause if it's me, there's no 2 lines right, there's no too much like you could be like, Hey, I want you to think about your family values and bring them to our meeting, and I'd be like all right.



01:14:46.000 --> 01:14:58.000

Yeah. Now, that's not gonna be everybody. So might you can ask that. So what do you want to ask them to have a better meeting for them?

01:14:58.000 --> 01:15:01.000

So the number one question you should ask, is there anything on your agenda right?

01:15:01.000 --> 01:15:07.000

I've said it 6 different ways. Hey? Anything? She has anything come up since we last met anything that's really important to you guys, anything you want to focus on in our meeting.

01:15:07.000 --> 01:15:19.000

So if you sign up for a calendly call with me, you're gonna get the same thing, and it's gonna ask those questions like it literally says to make the most of our time together, and to make sure where I'm as prepared as I can be.

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Please share with me what you'd like to focus on in our call.

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Now right, you're giving them a little bit like you're not just going whole enchilada.

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It's just, hey! Here's the agenda. Please take a look.

01:15:26.000 --> 01:15:37.000

Let us right? So it's what are the questions you wanna ask and when they're scheduling, I'm gonna say, here's the agenda.

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But is that open-ended question? Is that enough? Should we?

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Should it be more targeted than that? Is this for prospects or for clients?

01:15:45.000 --> 01:15:48.000

So for clients I would go with hey? What you know.

01:15:48.000 --> 01:15:55.000

Has anything changed since our last meeting? Is there anything specific that you wanna make sure we focus on on our call?

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That's it that you don't have it doesn't.

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We're not gonna be like. There's no, you know, confetti falling from the ceiling.

01:16:00.000 --> 01:16:04.000



You're just asking, because that's what proactive professionals do.

01:16:04.000 --> 01:16:05.000

And then you're just more informed there might be a thing to act on.

01:16:05.000 --> 01:16:11.000

There might not. They might just be like, Nope, we're all good, like, okay.

01:16:11.000 --> 01:16:14.000

When they come in you're going to tell them that you paid attention, hey?

01:16:14.000 --> 01:16:17.000

We notice when you scheduled on Calendar, you didn't have anything special.

01:16:17.000 --> 01:16:20.000

We've got an agenda for today. Just want to check in one more time.

01:16:20.000 --> 01:16:22.000

Is anything on your mind going on in the world? Anything you want to talk about or focus on.

01:16:22.000 --> 01:16:28.000

No, we're great. Great. Let's look at our agenda.

01:16:28.000 --> 01:16:33.000

So all you're trying to do is give them space to tell you what they might wanna talk about so that you're prepared for it.

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Have a question for you. Stuff so like on the last meeting with Adam, we were talking about kind of how his one-page plan is his agenda.

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Maybe there's a little bit more gear towards prospects. Do you see it?

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The same way. Here. Do you see the one-page plan is different from the agenda.

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You're sending to the client you can do you? We have people do.

01:16:49.000 --> 01:16:57.000

This is the beautiful thing you can do. Whatever works for you, so I don't think beyond the one-page plan.

01:16:57.000 --> 01:16:58.000

You don't need a lot like your agenda and agenda are great because they look professional like. Hey, here's what's on our agenda right?

01:16:58.000 --> 01:17:07.000

Review, one page, plan, make sure everything's on track. Right?



01:17:07.000 --> 01:17:08.000

Cover it right like, think about what's on that wheel is.

01:17:08.000 --> 01:17:14.000

Gonna be on your agenda. Just bullet points, right investment, portfolio review.

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That's all you need I have clients that just put it up on the screen, and the agenda is just up on the screen, and the second part that might be like for like thinking about the time to create all this for me, for the staff to read that for the meeting follow up like how do you think

01:17:30.000 --> 01:17:33.000

about that process so it's not taking hours and hours.

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Well, that's why I like batching. So even if you're not doing surges like, Prepare client meetings by week.

01:17:36.000 --> 01:17:37.000

Hey! 3 weeks out we're preparing meetings for the next year.

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Weeks. What's that process? This is why, if we're just doing it based on the client file, it's less efficient because all my only option is I pull the client file.

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I see what we did last time and then I build a custom agenda based on that.

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So we're trying to do is say, here's the agenda based on that model.

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Now, the first time you're going to pull those client files right?

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You're going to kind of reconcile people into that.

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But you're ultimately going to get to a point where all you're doing is looking at the agenda.

01:18:02.000 --> 01:18:09.000

That the team is developed based on the process that you built.

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So that's why we capture those issues in the one-page plan or somewhere else, because then we know them, and then they become part of those meeting agendas, and we start checking them off the list.

01:18:19.000 --> 01:18:29.000



Does that make sense? Okay, so can you dive a little deeper on how exactly you can automate some of that because I'm looking at that as a solo guy.

01:18:29.000 --> 01:18:34.000

And I'm thinking to myself, your Crm. Is your best best friend, so I have a Crm.

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But I I mean it won't automate, you know.

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I mean there were a number of processes in there's follow up emails and things like that.

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Is there a way to automatically trigger those? Yeah, a lot of we use infusionsoft. Keep.

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I would not recommend that for any of you, which is the one that huh!

01:18:52.000 --> 01:18:55.000

Adam uses, huh? Catherine is jumping up and down.

01:18:55.000 --> 01:18:56.000

Katherine wants to answer this question. Really bad I'm gonna let her answer.

01:18:56.000 --> 01:19:07.000

She's literally jumping up and down in the back of this is good because I'm looking for somebody who can this girl on this woman, I should say I'm 50 now.

01:19:07.000 --> 01:19:12.000

So anyone younger than me this is good cause I'm looking for somebody who can.

01:19:12.000 --> 01:19:14.000

This girl on this woman, I should say I'm 50 now.

01:19:14.000 --> 01:19:18.000

So anyone younger than me, especially I'm 50 now.

01:19:18.000 --> 01:19:24.000

So anyone younger than so missed. Jumpump it down back there. What do you want to share?

01:19:24.000 --> 01:19:31.000

Now she's all embarrassed.

01:19:31.000 --> 01:19:42.000

There's so many ways to automate, Darren and all of them are interesting to be able to harmonize everything so that it flows and keeps has a learning curve.



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But then it's really really powerful. So if you have, keep, they're really good about training air table. Zapier.

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All of those things they can be. It can be really beautiful when you harmonize it yeah, if you're not using your Crm, you're marketing automation emails.

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Right hubbly like those are the ones you can build those campaigns, and then calendly does campaigns so it just depends on which one.

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But there's going to be a tech platform that does it.

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So is there somebody who specializes in doing that, that you can rotate a check to, and it just goes away.

01:20:08.000 --> 01:20:16.000

People will gladly take your money to take to take those problems off your hands.

01:20:16.000 --> 01:20:19.000

Yes, so if there's somebody in the room, I'd sure love to talk to you.

01:20:19.000 --> 01:20:28.000

I don't. Is anyone wanna volunteer?

01:20:28.000 --> 01:20:34.000

Who's done some of those automations? Why do you guys share how you've done them with the microphone? Please?

01:20:34.000 --> 01:20:38.000

And we can hear you. Yeah, I have no idea what I did.

01:20:38.000 --> 01:20:41.000

I just hired someone on Fiveiver.

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And it works. Is this one so I'm a huge I went as deep as actually creating my own salesforce.

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Overlay does. All of my value, adds.

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All of them.

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That sounds like a tribe. Talk to me! What's that?

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So client of my firm, or a client of.



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Yeah, so the salesforce overlay has all of the information inside of it.

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And once it's in there, it's just a push up a button, and then we get a beautiful Pdf that we give you.

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The client, it's like, literally, you're like, you write the email, and you put insert field one, insert field, one, insert field 2, and it's literally so we can run like, I have 57 clients it'll take my admin less than an hour to run all 57 of the value

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adds, she then gives it to me. I review it. I don't know.

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Half hour, hour or so, mainly just looking for planning opportunities.

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Get it back to her, and then she sends it out to everybody.

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So it's so radically different. It's almost staggering right?

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Yeah. Beneficiary. Oh, yeah, I mean, it takes some time to get it set up, but once it's there you're I mean, it's effortless so you will literally get to the point where you sit down and you look at your service calendar, for the next year.

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And you and the team are like oh, here's what's going. Let's do this.

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This and this, and it's like, built 100%. And then you just show up.

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And once it's built, the next time you just go click the button your teams will love you well, the best part about it with your team is, I'm no longer involved, so she has the due date, and when it needs to be done she backs it out she starts it I'm more of a visionary

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than an integrator. So I see squirrels, shiny object.

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She's not, she is. This is what needs to happen.

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And this is when it needs to happen. So she knows that I'm bringing to our team meeting, you know, X days before we want the value.

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Add, to go out. So it shows up at the meeting we look through, and then I'm essentially removed from that entire process.

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That's fantastic. That's the power of technology. You can.

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When I talk about delivering 5 to 10 x the value in 50, 60, 70% less time, people are like, how?

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And then I explain it, and they're like, Oh, my gosh!

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She's not kidding. That's by the way, what you're gonna need to keep up with. So that's where we're seeing.

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Not so much fee, compression as service, inflation, and look what firms are doing with technology how's that gonna be in 5 years?

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This is gonna be table stakes. If you don't have a multi-channel model, you're going to be antiquated and doesn't mean your clients are all going to leave you.

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By the way, they might be there with you. But if you're like 65, and your clients are over 65, and you're going to retire in 7 years.

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Then, yeah, don't worry about it too much. If you're anyone else, you need to be paying attention because the world is going to change rapidly and radically, like you're already seeing.

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Literally. I can deliver a one-page plan that has updated action items to the client.

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Personally, every month, and the advisor isn't even involved.

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It's a click of a button.

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That's what you're gonna ultimately need to so that's when you can demonstrate that to clients.

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They're like, Wow, like value. Mode is huge. You're not losing those clients.

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You can see you can sit down with the client and say, Hey, we have a cycle we're going to meet with you right 2 times a year.

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We're going to do things in every meeting. We're going to cover different pieces.

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We're going to send those to you periodically, like we are here.

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Right. There's 99,000 things that happen.

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Our job is to make sure that you're not bothered by most of them.

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But throughout the year you're gonna consistently get things from us where we're doing planning work between our meetings like this isn't what we believe that planning is a process, not an event.

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And you're going to see that in our book. I want some of that right that Isaac service model where we can show them right.

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The core stuff happens here, the special stuff happens here that feels so personal to me.

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And I'm like, yes, I want that now. We've defined and demonstrated value of something that's very intangible and squishy. We've made it real.

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We've made it in art, something that they can say.

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I get it. It's not any one thing. It's not the one-page plan, or the meetings, or the value it's all of that together, feels.

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Can you see how, when you put that together, it feels so solid?

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It's just gonna feel solid. One more question over here.

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Actually 14 min more with the questions over here.

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Almost forgot what I was. Gonna ask advice. What advice do you have for people that somewhere?

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I don't know if you talked about it today much, but in the surge process, blocking out Mondays for prep and Fridays for follow-up.

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And what advice do you have for people that are maybe struggling with that time?

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Blocking and condensing the meetings to Tuesday, Wednesday, Thursday.

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Anyone here doing surges? This struggle with that. So I'm gonna let you guys, it's fun.

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You guys answer these questions? I will answer, but anyone struggled with that that wants to share like, how did you solve for that in terms of like?

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Is it really a big deal, or does it feel like a big deal? I do exactly.

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That Mondays are prep for the week, Tuesday, through Thursday of 9 meetings.

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So my meetings are more. About 45 min, and that's because, and we did have it longer.

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And we found the meetings. We're taking 45 min, and clients were happy, and then Friday is my summary day.

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So I do that for about 2 and a half weeks, and I guess we can do the math and figure out how many clients I'm hitting, and it's become seamless over the last 3 years.

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That's awesome. So I guess I'm in the middle of a power transition I think I've done 135 meetings in the past 7 or 8 weeks.

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His partner passed unexpected. My partner passed away. I've been doing meetings 3 days a week, Monday is and Fridays and I learned about the first week, maybe second week.

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The answer is not, no. When somebody wants to meet on Monday or Friday, it's hell.

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No, because it will absolutely rock your world, and it will make you miserable, and wish you weren't in a business.



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Those days are essential to sanity. Saturdays are out, and everybody always wants to say, Well, I can't meet those days.

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But mysteriously. I found out when you just say, Hey, you know what I'd really love to do.

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It. If something changes, I'll call you about the third time they try that they finally realize, hey, he's really serious.

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He's only going to meet Tuesday, Wednesday, or Thursday, and they schedule a meeting.

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It's really cool. If you use calendar or acute, because, surprisingly, the only option for Tuesday, Wednesday, and Thursday why am I getting this email 3 times right?

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So, is we want to be as efficient as we can.

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Other questions.

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Alright, we're gonna spend some time working on. We're gonna answer this question.

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And then I want you guys to spend about 1015 min.

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I think 12 and a half, according to my time, working on your model meeting.

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So I want you to think about what are the time? Segments to just take a circle like?

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Sure. Yeah, I can go back to the example if you want me.

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I just want you to apply the idea in a couple of minutes and then pick a section like, hey, what are the 3 questions I'm gonna use as my opener, hey?

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When I go to and like what's that prompt your question like? That's how you're ultimately going to build out the agenda, for your meeting is right.



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What are the questions I want to ask at each section? Does that make sense?

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Not a question, just a tip on a calendar.

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Great. Make sure you have upgraded to whatever level has workflows in it, cause I don't think it's the base level cause.

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The workflows is where you can build out the text reminders in the email reminders and customize them.

