



PERFECTING YOUR PRACTICE

Objective

Build a practice that anticipates trends in the industry. Work with appreciative clients who pay for value. Grow your business primarily through current clients.

How?:

Follow a procedure starting with examining where you are now, trends affecting the business, where you want to be in five years and how you can get there.

What Does the Seminar Contain?

Phase One – Evaluating What You Have Now:

- Where is your business now?
- What do clients, the public, regulators (and everyone else) want?
- Where will you be in five years *without* changes?

Phase Two – Determining What You Could Have

- What is a realistic target for growing your business?
- How is this practice structured?
- Where will the revenue come from?

Phase Three – How Would You Bring The Pieces Together?

- Would I need extra clients?
- Where would they come from?
- Will I find them?
- Will my clients send them?
- Can my assistant help?

Phase Four – Charging and Being Paid For Value Delivered

- What will you charge and what will you deliver?
- Why would your clients tell others about you?

Action Plan:

- Two page step by step procedure to implement strategy.
- Includes measurable deliverables at each step

What Do Advisors Say?



- *“Actionable ideas broken down into chunks”*
- *“Ways to subtly talk to clients and get them interested in new services”*
- *“Discussion on how to socialize + meet new clients. Questions to ask – How to respond”*
- *“Practical ideas, Good job of identifying hidden money opportunities”*