

THE ON-RAMP TO GROWTH

REIMAGINE, REFRAME and REIGNITE your business

Presented by: Duncan MacPherson



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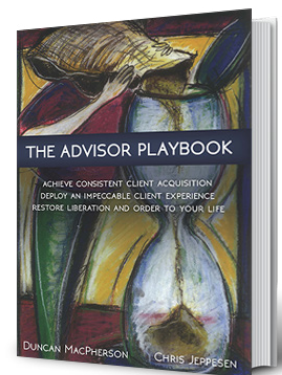
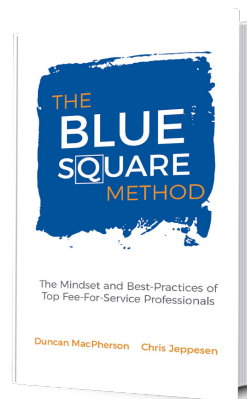


DUNCAN MACPHERSON

As founder of Pareto Systems, an industry-leading consulting firm, Duncan travels extensively throughout North America and around the world, conveying dynamic and actionable presentations that have made him a popular spokesperson for the financial industry. He is also co-author of the best-seller *The Advisor Playbook* and the upcoming *The Blue Square Method*.

Duncan's expertise in demystifying business development and branding in the financial world has universal appeal; from the high-level advisor to the successful wholesaler, to corporate financial institutions. Duncan's primary goal is to help financial professionals achieve liberation and order in their business and personal lives.

Join Duncan on

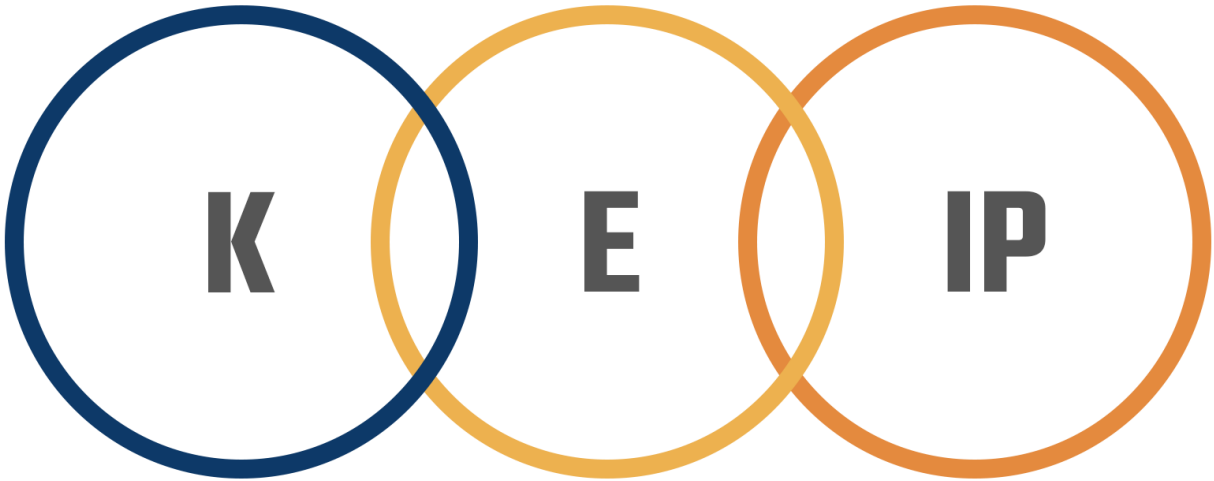


Pareto Systems is a leading business development consulting firm. We provide proven business development, practice management and client acquisition solutions to top fee-for-service professionals. Through our **Elevated Consulting** partner, we also provide solutions for the elite fee-for-service professional with extensive and complex needs, including shifting from organic to scalable growth, building turnkey intellectual property and maximizing enterprise value.

Our technology partner, **Blue Square Apps**, provides tech solutions to digitize best practices and automate processes to create consistency in adoption and deployment of client relationship management, standardization and optimization.



YOUR PROGRESSION



Notes

WHERE DO YOU START?

ONside: Prospects

GOAL: Build trust, a self-evident decision

- *Process is your primary differentiator*
- *Ideal client profile established (Alignment, Attitude, Advocacy)*
- *Fit/Discovery Process*
- *Welcome Kit*
- *Sounding-board language in place (not referral language)*
- *Recognition to referrers for introductions*

ONboard: Service Model

GOAL: Competitor-proof, capture \$ in motion

- *Segmentation: designed and delivered*
- *Foundation for advocacy*
- *"Open kitchen" – nothing hidden*
- *Strategy/Tactical meeting process*
- *Anticipating needs*
- *Seamless coordination with other advisors*
- *Stream of valued communication w/context*

ONgoing: 1-3 Months

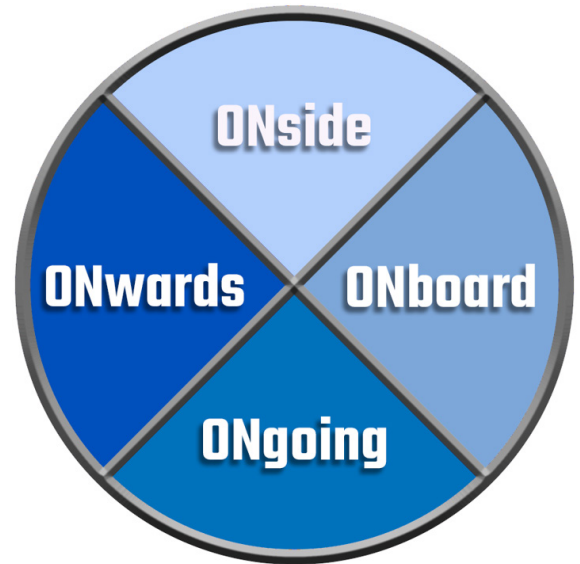
GOAL: Fast track to advocate, no buyer's remorse

- *Discovery document/goal summary*
- *Client onboarding process*
- *Wealth strategy implementation*
- *Personal financial organizer*
- *Orientation to digital sources (web, app, etc.)*
- *Bring Attorney/Accountant into your process*

ONwards: Legacy Clients

GOAL: Bullet-proof relationships (Kevlar)

- *Moments of truth/Critical life events*
- *Creating a legacy for clients*
- *Genuine interest in client's passions*
- *Unique client appreciation events*
- *Books and articles of interest*
- *Client gifts*
- *"Impact and shelf life"*



Notes

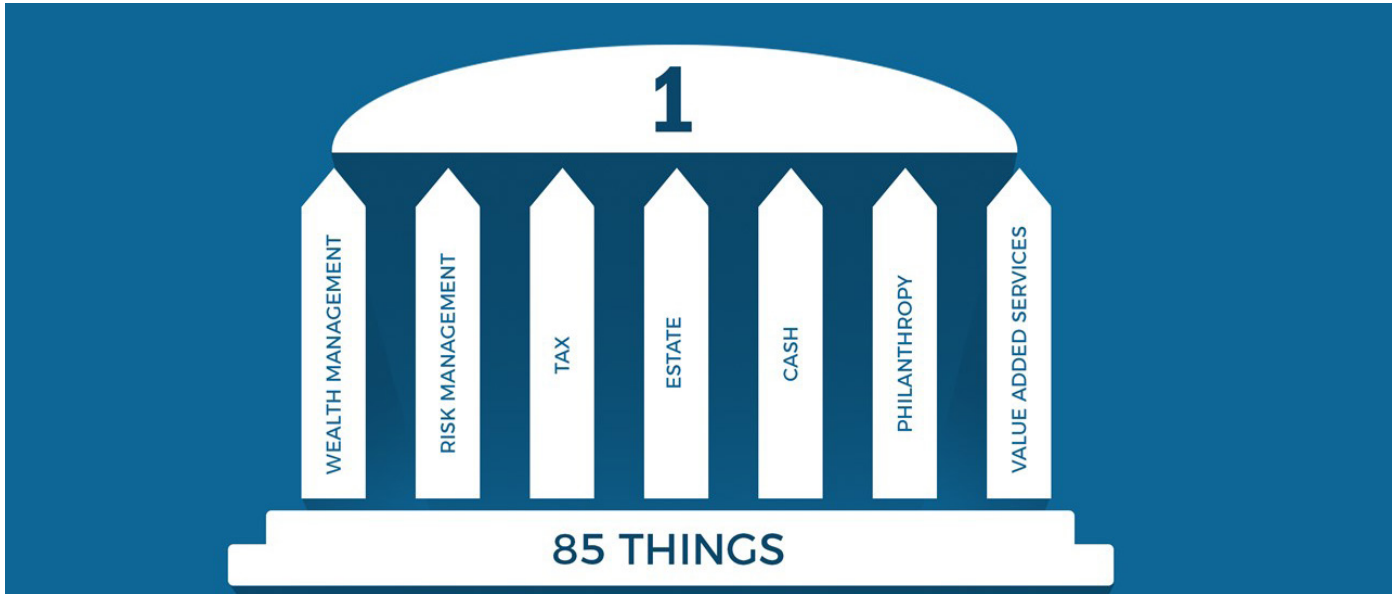


THE LOST ART OF FUTURE-PACING



Notes

POSITIONING NOT PITCHING



Notes



PMIND^{EX}

Get clear on your opportunity gaps Practice Management Index (PMI)



The PMI is an assessment on a team's practice management capabilities, focused on helping advisory teams identify opportunity gaps in their business. The PMI provides a quantitative measure/score for financial teams to know "where they rank" in 18 key focus areas of practice management.

In addition, the Opportunity Report gives you a detailed summary of the action steps you can take now to address your most pressing opportunity gaps.

You can take your PMI anytime following these three easy steps:

Take the PMI today:

1. Sign-up for the PMI at: practicemanagementindex.com
2. Complete the assessment
3. Download your Score & Report

