



Your Fully Functioning Deliverables Team

- ▲ The Three Meeting Process™ Installed & **Well-Understood** by all Deliverables Team Members
- ▲ Deliverables Checkpoints™ **Well-defined** (planning checklist around The Ten Client Deliverables™)
- ▲ The Go-To Grid™ **Current** (and kept updated)
- ▲ The Best Way™ **Exists** for every Deliverables Checkpoint™
- ▲ All Client Progress Prep-work **delegated** to Deliverables Team
- ▲ The Dry-run Prep Meeting™ **scheduled** 7-10 days prior to every client meeting



Your Commitment

- ▶ To establish fully comprehensive financial services for all your Ideal Clients **as soon as practical**
- ▶ To deliver fully comprehensive financial services **through a team:**
 - A Deliverables Team (DT) of
 - Best-in-Class (BIC)
 - Subject Matter Experts (SMEs)
 - (With you no longer serving as any of the Subject Matter Experts)

So what's **My Role** then?

- ▲ Spend more time gaining establishing a **deepened understanding** of each Ideal Client's circumstances in order to "**show up as Trusted Advisor**" and demonstrate for each Ideal Client...
- ▲ An almost **effortless understanding** of them and their aspirations
- ▲ Skilled at Helping clients think (and **separate logic** from **emotion**)
- ▲ Expert at **framing** issues
- ▲ Puts issues "**in context**"
- ▲ Skilled at **challenging assumptions**

- ▲ Are **consistent** & can be depended upon
- ▲ Helps clients see things from **fresh perspectives** (prepared)
- ▲ **Doesn't pull punches** (can be counted upon for the truth), however...
- ▲ Skilled at **correcting behavior** (lovingly), as opposed to criticism or being judgmental.
- ▲ Has the **Client's Back** (always has the client's interests at heart) & insists on all conflicts be disclosed.
- ▲ Remembers **everything** ever said by clients (seemingly with few if any notes)