



INITIATE



IMPLEMENT



INTERACT

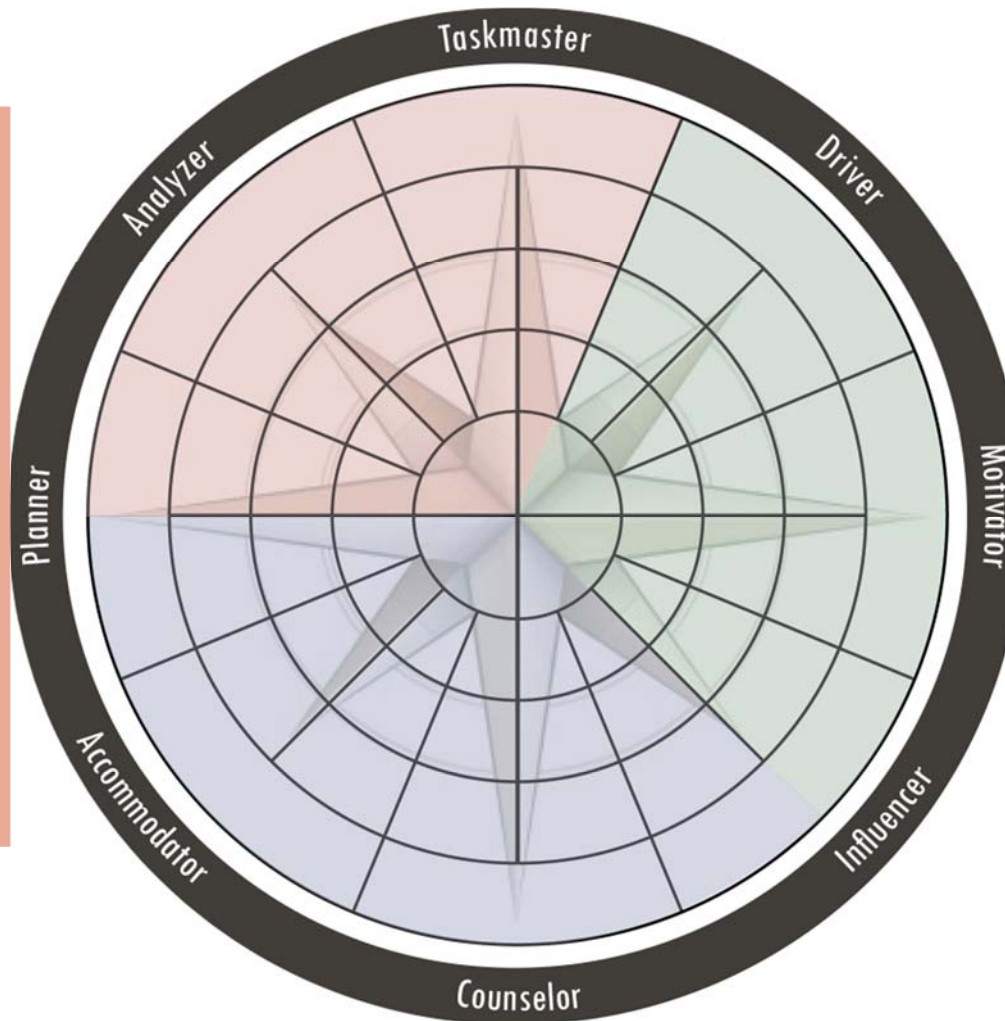
3 Types of Advisors

“GRINDER as Advisor”

Strengths: seeks to offer “right” solutions; analytical; holistic wealth planning; builds long term clients; emphasizes performance and quality of advice; persistent in long sales process, likes technical work; prefers one-on-one interactions.

Potential challenges: dislikes cold calling; avoids networking or socializing in large groups; may not ask for business; prefers talking business rather than personal; business may take long time to close; can come across as non-emotional.

May need: system to help with sales/marketing; scripts to know what to say and when; patient manager.



“FINDER as Advisor”

Strengths: typical quick, sales driven style; initiates contacts; likes prospecting and closing business; thinks as each sale as a transaction then moves on to the next opportunity.

Potential challenges: impatience; inconsistent; inability to delegate tasks, incomplete paperwork; doesn't always follow the rules; doesn't take advantage of referral potential; over promises / under delivers

May need: strong admin staff to organize, follow up, and manage details; relationship manager once the business has grown or may lose clients due to lack of service.

“MINDER as Advisor”

Strengths: consultative approach to sales; enjoys getting to know all aspects of client's needs; team and service oriented; strong client retention and referral potential.

Potential challenges: closing business; longer than necessary sales process; lacks sense of urgency; focuses too much on people activities and not tasks; taking anyone on as a client.

May need: systems for completing tasks; person to hold them accountable to setting and achieving goals; help focusing time and efforts on profitable clients.