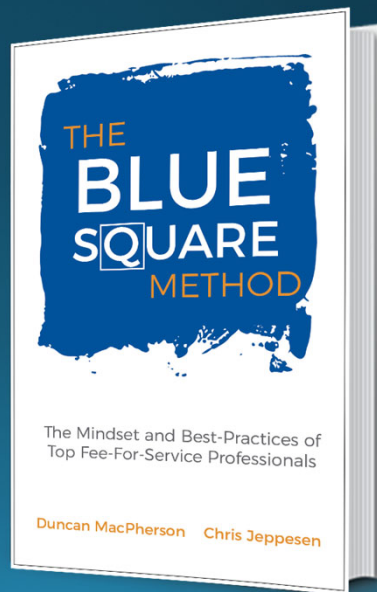


The Strategic Growth Blueprint

How to Reimagine, Reframe,
and Reignite Your Business



Linked 



Jason Westover

Speaker | Business Coach





4 Phases of the Journey

Growing



Teaming



Scaling

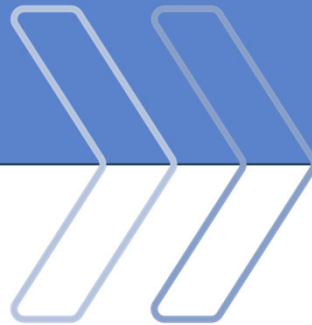


Exiting



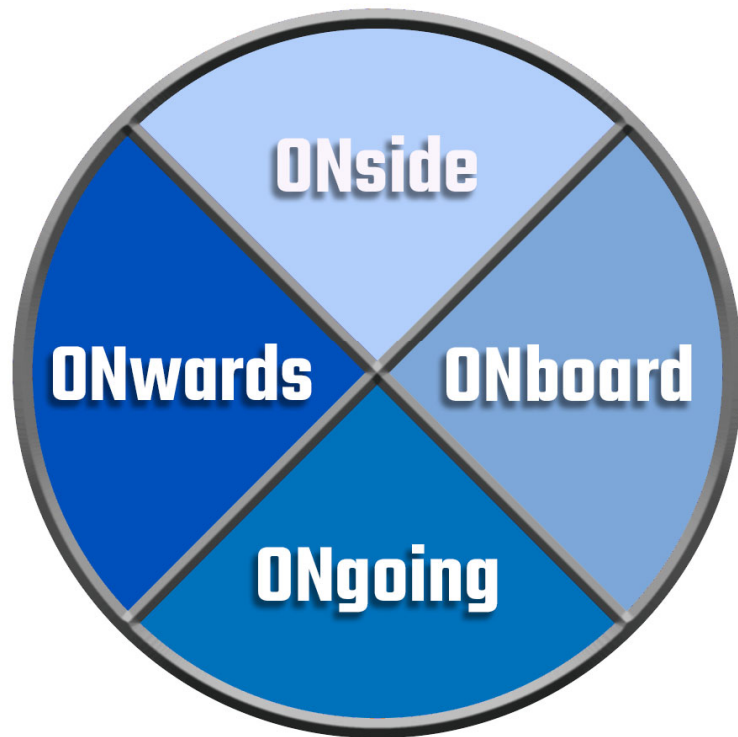


CONVERSION



CONVERGANCE

Always ON

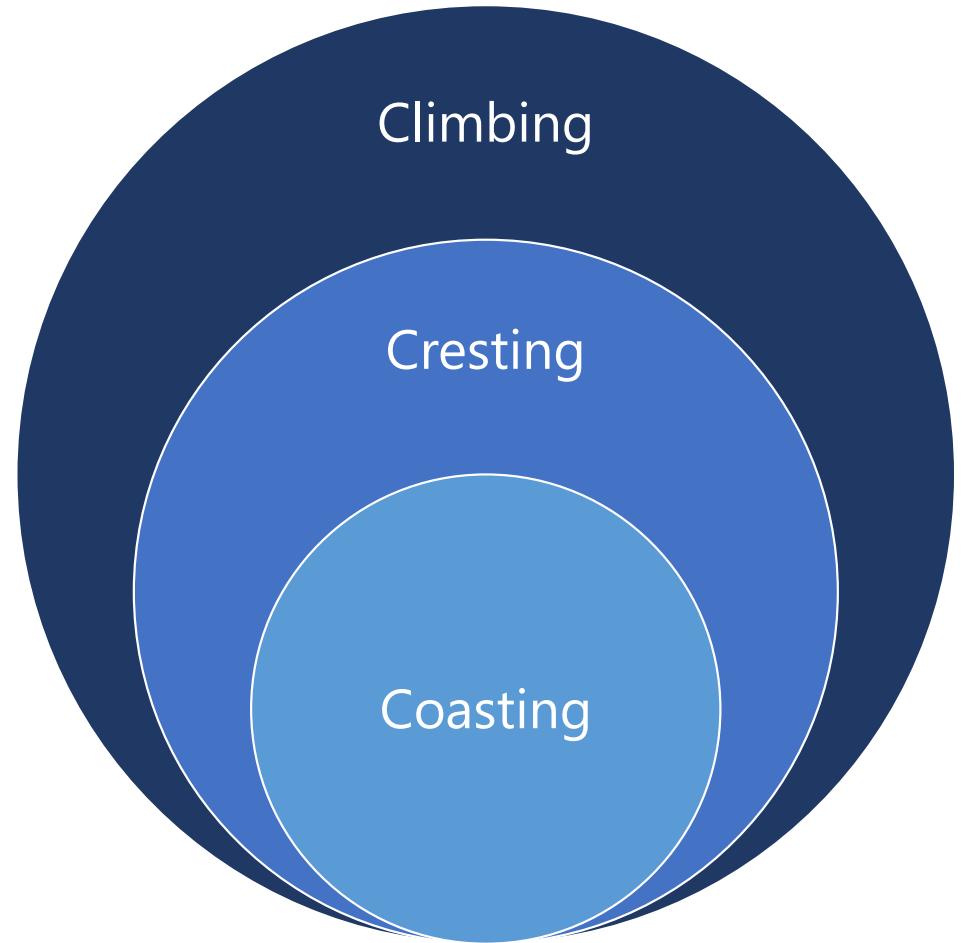


Identify 6-8 Gaps





3 Types of Teams

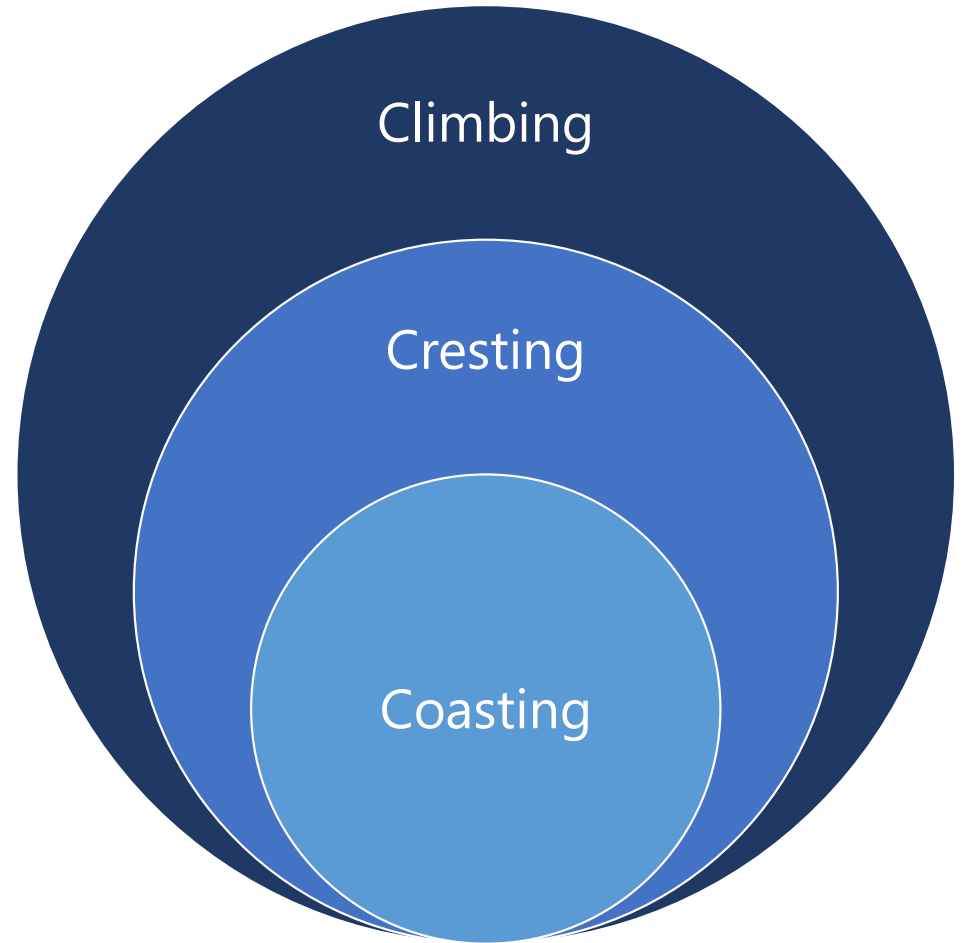


Garrett Confronts Richie While Polishing Forks - Scene | The Bear | FX

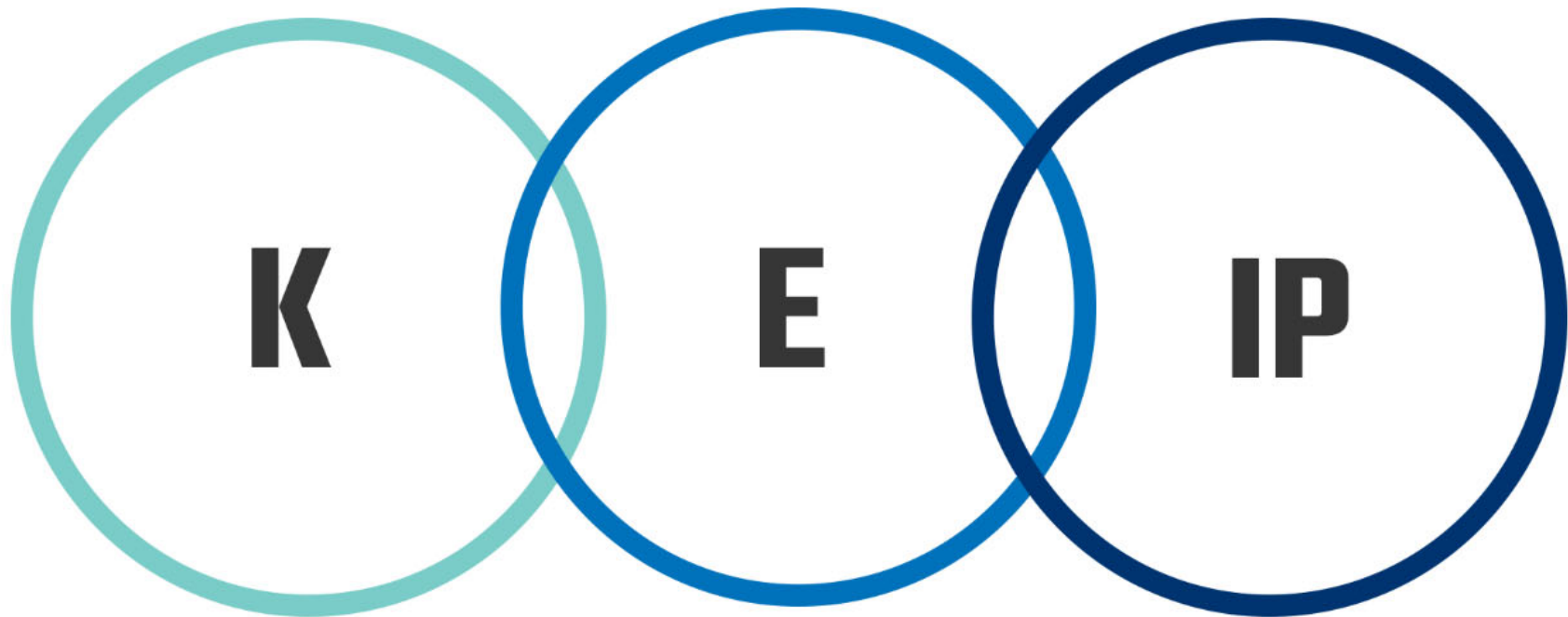




3 Types of Teams



Your Progression



THE RULE OF 3



"Anything you do 3 or more times that has 3 or more steps has to be documented digitally and physically."



Always ON



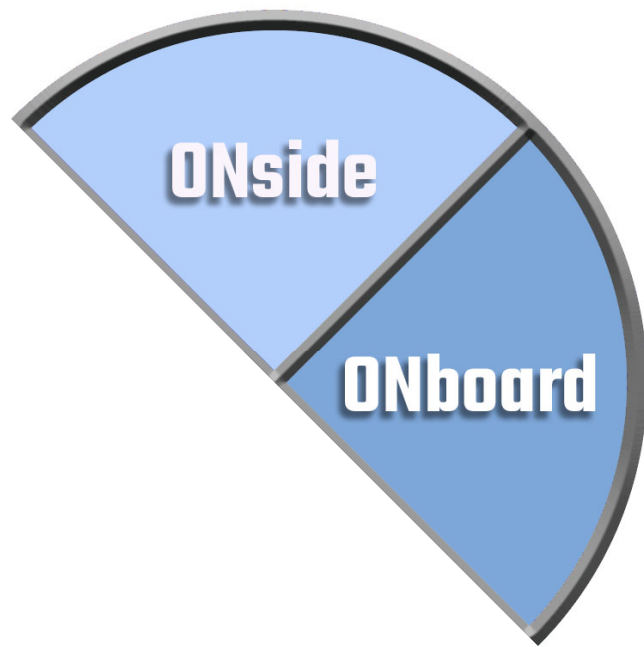
FIT PROCESS

☐ 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

Always ON



ONBOARDING

☐ 1-3 Months

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

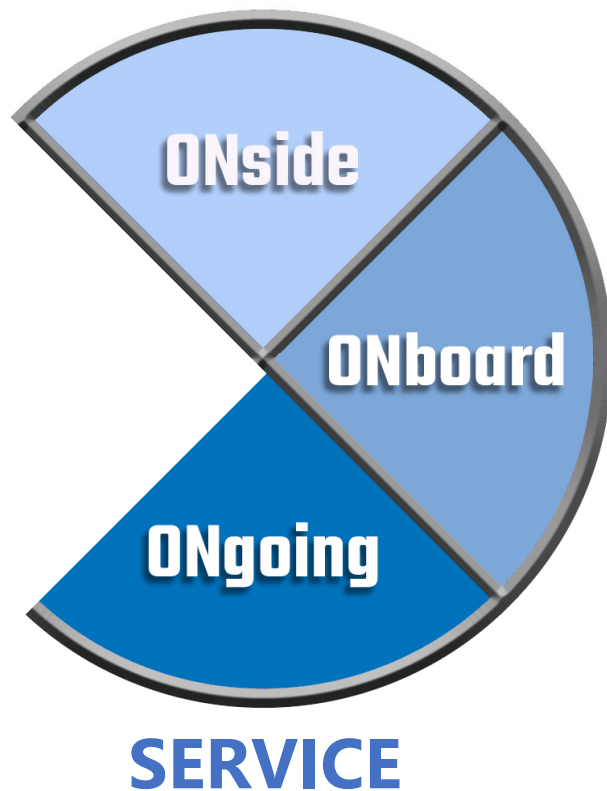
- Discovery document/goal summary
- Client onboarding process
- Wealth strategy implementation
- Personal financial organizer
- Orientation to digital sources (web, app, etc.)
- Bring Attorney/Accountant into your process

3 for 1 Opportunities

- New Clients
- Existing Clients
- Strategic Partners



Always ON



□ Service Model

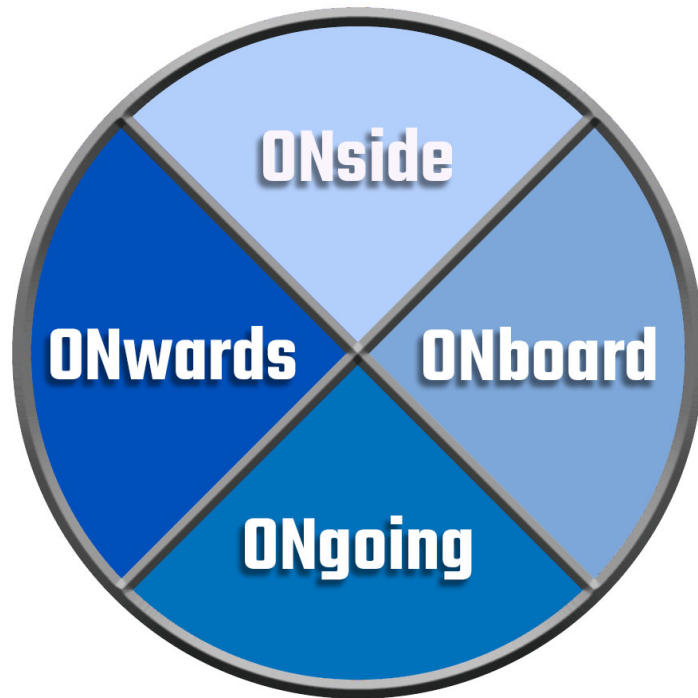
GOAL: Competitor-proof, capture \$ in motion

- 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

12-4-2

- 12 **PROACTIVE** Contacts
- Quarterly Calls
- Bi-Annual Strategic and Tactical Meetings

Always ON



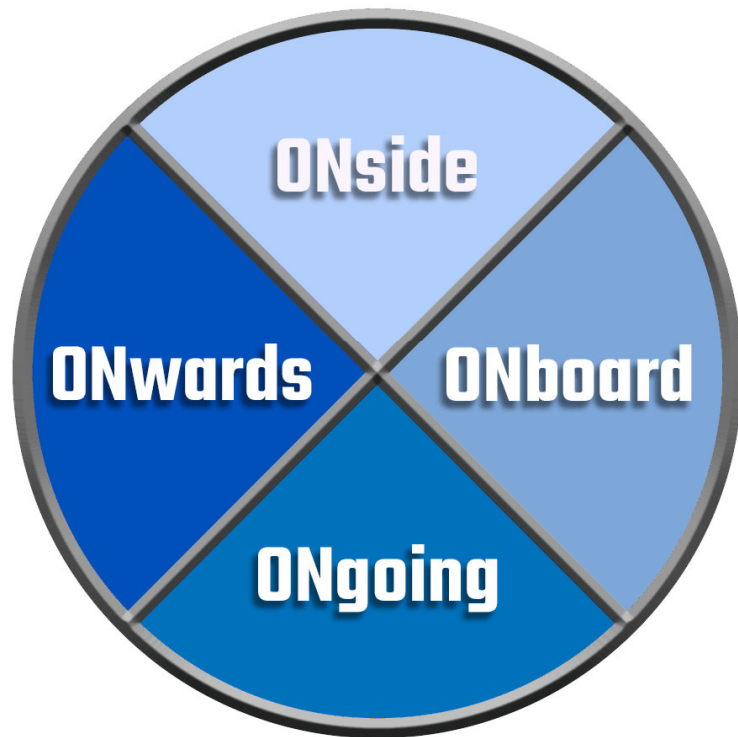
OBSERVATION

☐ 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"

Always ON



Identify 6-8 Gaps

90 Day Challenge

- Time Audit
- Call Rotation
- Finish Strong



The Review Meeting is Obsolete



- Review Meetings repositioned
- Rehash or fluid and dynamic?
- Ramp-Up, Execute, Follow-Through
- "All Part of the Process"

Strategy & Tactical Meeting

In Person or Virtual

Strategy & Tactical Meeting Agenda

STRATEGY & TACTICAL MEETING

[Client Name]

[Date]

[Time]

ITEMS TO BE DISCUSSED:

- How's life?
- Pinpointed update
- Your evolving FORM goals
- Strategy & tactical updates
- Mid-course corrections
- An overview of our process
- Our value-added services
- Looking down the road



It starts with a mindset around:

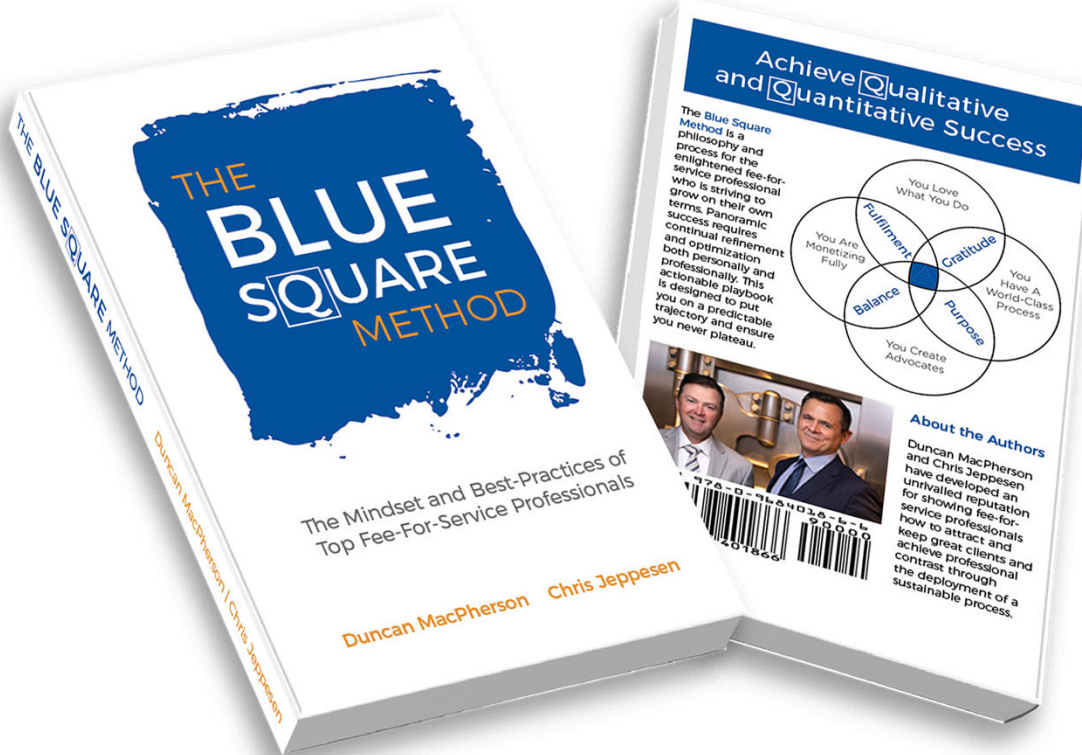
- Volatility
- Commoditization
- Time Allocation
- Growth

This is why...

Empathy

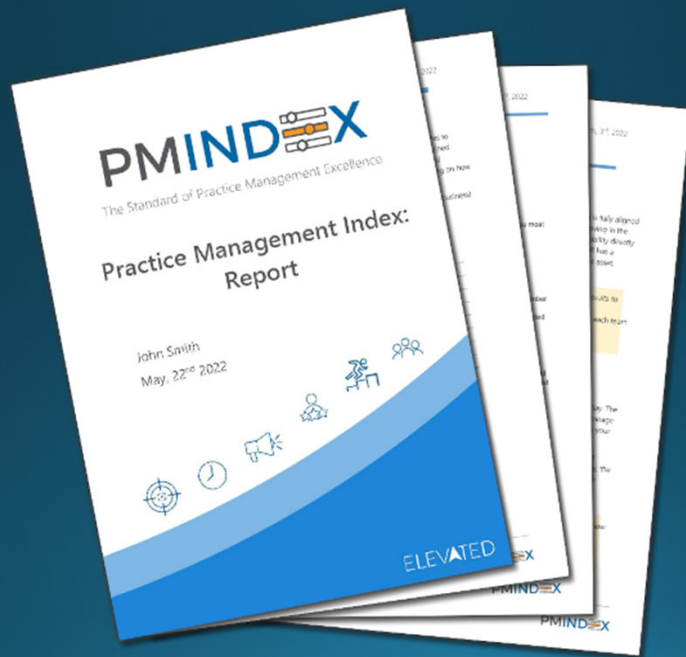
Context

Planning



thebluesquaremethod.com

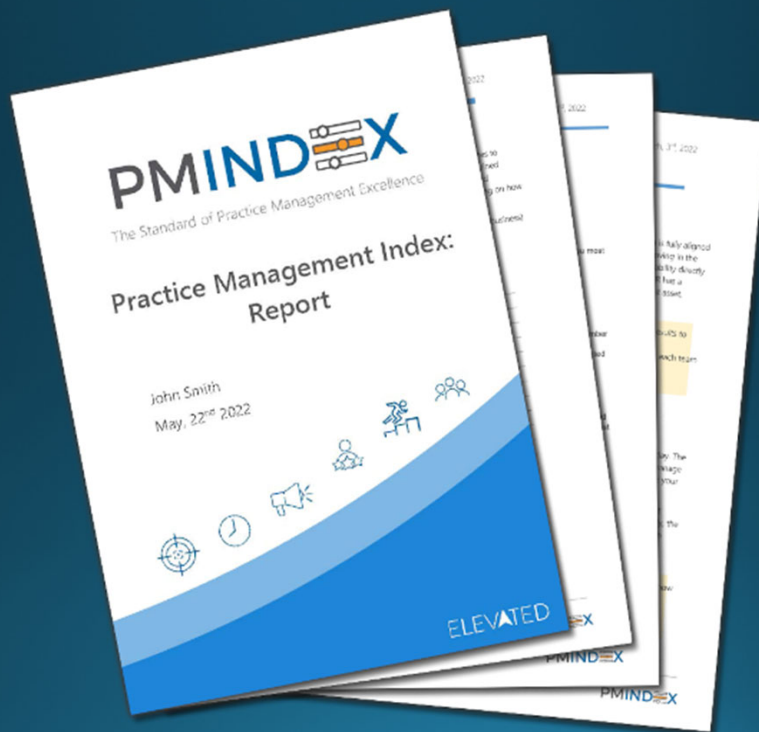
Get Clear On Your Opportunity Gaps



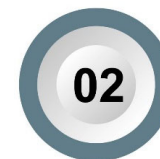
PMIND  X

Explores 18 Focus Areas

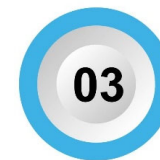




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Thank you!



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