



Practice Management Summit

Raise the Trajectory of Your Business!

Steve Saenz, Founder
Advisor Solutions Network

Advisor Solutions Network

asn360.com

Program Content

Designed to achieve three key objectives...

1. Help advisors **render advice** in a Black-Swan era
2. Help advisors **regain client confidence**
3. Help advisors **rebuild their businesses**

Rendering advice in a Post Black-Swan era

1. Conviction

- Assess & accept (past)
- Share experiences (present)
- Remain open to new ideas (future)
- Prepare to make some changes (future)

2. Decisions

- Assumptions
 - ✓ Knowledge & Experience
- Tools
 - ✓ Known / Unknown / Yet to be developed
- Methodologies
 - ✓ Philosophy / Process / Partners

Regaining Client Confidence

1. Experience

- Process (tangibles)
- Relationship (intangibles)
- Deliverables (what you do for them)

2. Expectations

- No assumptions here
- Define, redefine and check progress
- What you say / don't say

3. Education

- Information vs Knowledge
- Passive vs. Active Clients
- Family Members

Rebuilding Your Business

1. Clear and compelling story

- Advice
- Relationship
- Experience

2. Told to the right people

- Your key clients
- Inner circle of influence
- Outer circle of influence

3. Communicated in the most effective way

- Marketing Materials (what)
- Marketing Strategies (how)
- Marketing Channels (where)

The Optimized Practice: Client Facing Systems

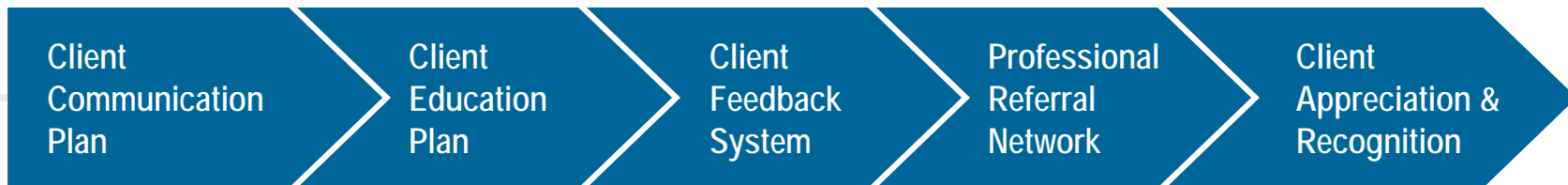
Your Marketing Strategies drive qualified prospects into your pipeline



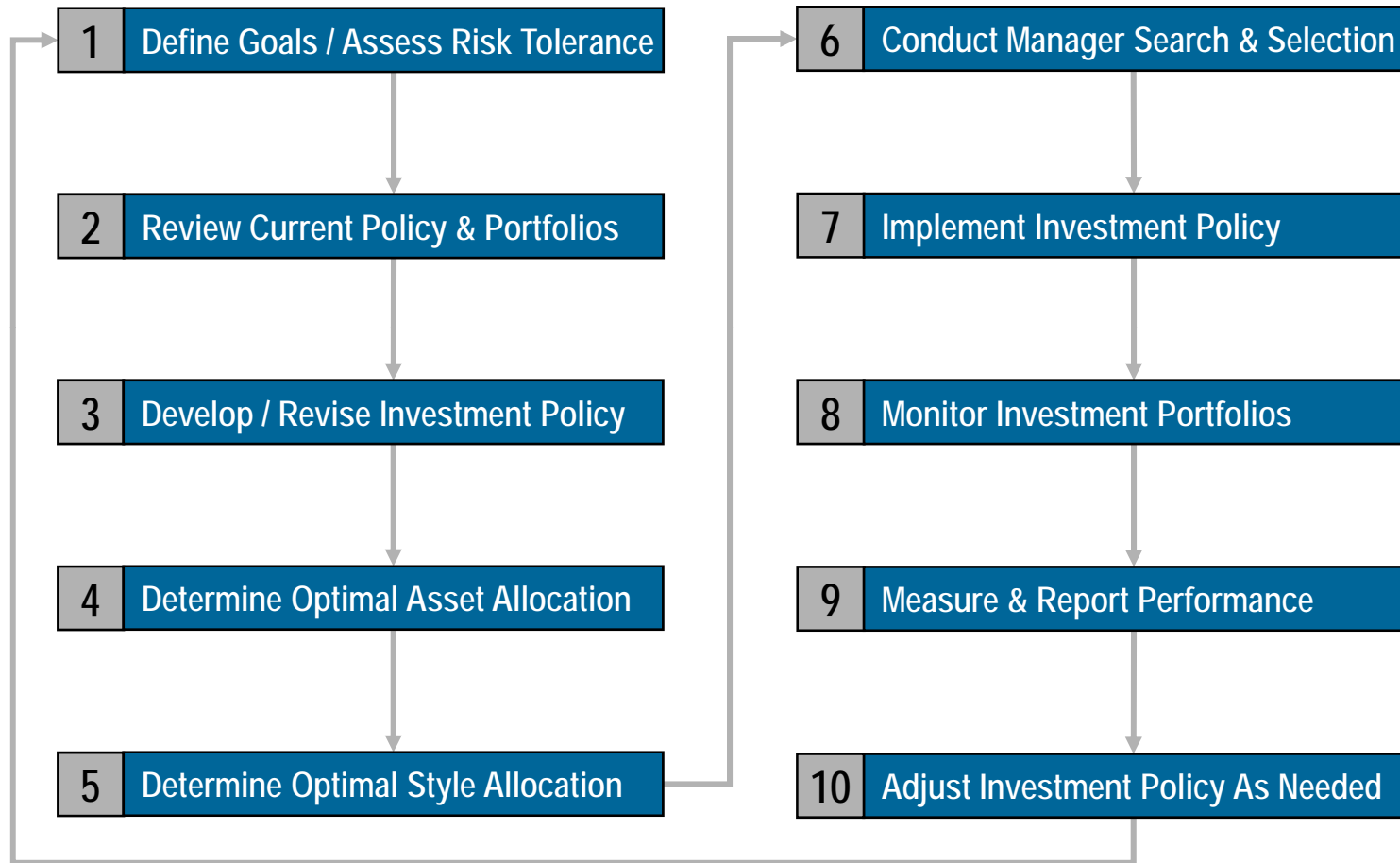
Your Investment or Wealth Mgmt Process determines the quality of your advice



Your Loyalty Process turns clients into advocates, which generates more referrals



Sample Investment Management Consulting Process



Your Extended Team & Professional Services Network

