CARSON COACHING

Business Builder Implementation Track

This track is designed for advisors who have completed the Emerging Advisor Implementation Track. It is a structured program to help you implement important Proven in the Trenches concepts to build a solid foundation, grow, and find balance. We've provided a suggested schedule, but you can work through the material at your own pace. Once you've finished with the Business Builder implementation track, we recommend moving on to the Advisor to CEO implementation track to help you develop as a leader, think strategically, and grow your team.

Month 1 – Delegation

» **Week 1** – Review the Delegation course.
» **Week 2** – Complete the 100 Items to Delegate tool and determine one or two activities to delegate to a team member right away.
» **Week 3** – Using the Delegation Worksheet, delegate the activities you identified last week to the team member with the skill, capacity, and desire to take on those tasks.
» **Week 4** – Follow through on delegating the tasks from the previous week by using the Train/Observe/Watch/Release/Verify structure.

Month 2 – Organizational Structure & Job Descriptions

» **Week 1** – Review the Crafting Effective Job Descriptions course.
» **Week 2** – Using job description templates, create job descriptions for everyone in your firm.
» **Week 3** – Review the Organizational Structure as a Foundation for Growth course.
» **Week 4** – Create an org chart for now and 3 years in the future.

Month 3 – Systemize Firm

» **Week 1** – Review the Systemize Your Firm course & identify a project manager.
» **Week 2** – Direct the project manager to create a project plan, process template, and determine where to store processes.
» **Week 3** – Meet with your team to kick off the project. Use the 12 Areas to Systemize resource to create a prioritized list of processes to be written. Give instructions for at least one process to be drafted by each person on your team in one week.
» **Week 4** – Direct the project manager to begin compiling the process manual and manage the project to completion.

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Month 4 – Client Segmentation

» **Week 1** – Review the Client Segmentation course.
» **Week 2** – Work on your Segmentation Spreadsheet.
» **Week 3** – Continue working on your Segmentation Spreadsheet.
» **Week 4** – Finalize the Segmentation Spreadsheet and reflect on what you want to do with the information.

Month 5 – Brand & Differentiate Your Planning Process

» **Week 1** – Review the Branding & Differentiating Your Planning Process course.
» **Week 2** – Complete the Differentiated Planning Brand Worksheet.
» **Week 3** – Role play your tagline and brand messaging with a friend, family member, or colleague twice each day this week. Make edits as needed to make it feel authentic.
» **Week 4** – Create a list of places you want to incorporate the branding message and develop an action plan for doing so.

Month 6 – Client Experience

» **Week 1** – Review the Delivering a World-Class Client Experience course.
» **Week 2** – Complete the Client Experience Action Plan and schedule team meeting to discuss.
» **Week 3** – Meet with your team to discuss your Client Experience Action Plan and get feedback.
» **Week 4** – Designate a client experience specialist and set up a regular time to review progress in this area.

Month 7 – Client Advisory Council

» **Week 1** – Review the Client Advisory Council course.
» **Week 2** – Select clients and determine details of first advisory council meeting.
» **Week 3** – Invite clients to advisory council and first meeting.
» **Week 4** – Use the Client Advisory Council Checklist and other resources to continue advisory council meeting preparation to completion.

Month 8 – Service Model

» **Week 1** – Review the CX: Service Models and Fee Structures course.
» **Week 2** – Use our Client Service Matrix to outline your service model and fee structures for internal use.
» **Week 3** – Using our Sample Menu of Services as a reference, create a client-facing menu of services.
» **Week 4** – Create plan to adjust clients' services, modify fees, or hire an advisor to help less complex clients, as needed.

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Month 9 – Client Onboarding

- **Week 1** – Review the CX: Client Onboarding course.
- **Week 2** – Develop and document the client onboarding process you will be implementing using the Sample Client Onboarding Process and Process Template.
- **Week 3** – Create supporting documents for your client onboarding process, like the Personal Preference Questionnaire, New Client Welcome Letter, or New Client Guide.
- **Week 4** – Build the client onboarding process in your CRM so that nothing falls through the cracks.

Month 10 – Client Appreciation

- **Week 1** – Review the CX: Client Appreciation Strategy course.
- **Week 2** – Create and document your annual Client Appreciation Plan and build it into your CRM.
- **Week 3** – Send a Random Act of Kindness to one of your clients.
- **Week 4** – Plan a client appreciation event using our Appreciation Event Checklist.

Month 11 – Client Communication

- **Week 1** – Review the CX: Client Communication course.
- **Week 2** – Complete the Client Contact Schedule.
- **Week 3** – Create a Client Communication Plan and purchase any additional tools you might need, like a mass email system.
- **Week 4** – Build your client communication plan and contact schedule into your CRM so nothing falls through the cracks.

Month 12 – Client Education

- **Week 1** – Review the CX: Education course.
- **Week 2** – Create and document your annual Client Education Plan and build it into your CRM and internal processes.
- **Week 3** – Plan a client education event using our Educational Event Checklist.
- **Week 4** – Create other content as dictated by your client education plan.

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Month 13 – Client Service

- **Week 1** – Review the CX: Service course.
- **Week 2** – Use our Sample Client Service Standards Document resource to create service and communication standards for your firm.
- **Week 3** – Communicate your new service standards to your team and build them to your CRM and other processes.
- **Week 4** – Develop a system to monitor service issues and resolution times.

NEXT: Begin Advisor to CEO Implementation Track

Carson Group
14600 Branch St.
Omaha, Nebraska 68154

carsongroup.com
800.514.9116
coaching@carsongroup.com