CARSON COACHING

Emerging Advisor Implementation Track

This track is designed for advisors in years 0-5 of their career, generally with under $25M AUM (equivalent of $250,000 of annual revenue). It is a structured program to help you develop your skills in key areas for growth: goal-setting, productivity, business development, and client reviews. We've provided a suggested schedule, but you can work through the material at your own pace. Once you've finished with the Emerging Advisors implementation track, we recommend moving on to the Business Builder implementation track to help you build a solid foundation that will allow you to further grow your business, make an impact, and leave a legacy.

Month 1 – Blueprinting

- **Week 1** – Review the Blueprinting course and schedule time on your calendar to complete the Blueprinting Guide.
- **Week 2** – Complete your first draft of Blueprinting Guide.
- **Week 3** – Review and reflect on your first draft of the Blueprinting exercise.
- **Week 4** – Revise your initial Blueprinting draft as needed.

Month 2 – Personal Development

- **Week 1** – Review the Creating a Personal Development Plan course.
- **Week 2** – Using your Blueprinting Guide and what you learned in the Personal Development course, set personal goals.
- **Week 3** – Create a personal development plan using the Development Plan Worksheet.
- **Week 4** – Begin implementing your personal development plan by blocking personal development time, signing up for courses, hiring a coach, etc.

Month 3 – Time Management & Productivity

- **Week 1** – Review the Time Management course and complete the 6 Most & Vital One tool every day this week.
- **Week 2** – Continue using the 6 Most & Vital One tool each day.
- **Week 3** – Review the Maximizing Advisor Productivity course and complete the Productivity Scorecard.
- **Week 4** – Continue using the Productivity Scorecard.

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Month 4 – Define Your Ideal Client Profile

» **Week 1** – Review the Defining Your Ideal Client course.
» **Week 2** – Work on the Ideal Client Workbook.
» **Week 3** – Work on the Ideal Client Workbook.
» **Week 4** – Complete the Ideal Client Workbook and reflect on what value proposition you need to attract those ideal clients.

Month 5 – Ask for Referrals

» **Week 1** – Review the Asking for Referrals course and complete the Convince Yourself First exercise.
» **Week 2** – Select the referral approach you want to use and craft your value story.
» **Week 3** – Practice your value story and referral ask conversations every day this week.
» **Week 4** – Use the Proactive Introduction Plan resource to create a specific, actionable plan for asking for introductions.

Month 6 – Passion Prospecting

» **Week 1** – Review the Passion Prospecting course and complete the Identify Your Passions exercise.
» **Week 2** – Using the Passion Prospecting Checklist, begin planning a passion prospecting event.
» **Week 3** – Invite clients to your passion prospecting event.
» **Week 4** – Continue planning the passion prospecting event to completion.

Month 7 – Converting Prospects to Clients

» **Week 1** – Review the Converting Prospects to Clients course.
» **Week 2** – Define and document your sales process and create supporting materials.
» **Week 3** – Practice using the discovery questions with friends, family, or colleagues.
» **Week 4** – Role play objections and how you would address them with friends, family, or colleagues.

Month 8 – Leveraging Social Media

» **Week 1** – Review the Leveraging Social Media course.
» **Week 2** – Complete the Content Topics Brainstorm exercise.
» **Week 3** – Pick at least one social media platform to use and set up your account.
» **Week 4** – Use the Social Media Calendar template to plan out your social media posts for the next 30 days.

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Month 9 – Prospecting Through Educational Events

» **Week 1** – Review the Prospecting Through Educational Events and Workshops course.
» **Week 2** – Select an event topic and date, then use the Educational Event Checklist and other resources to further plan your event.
» **Week 3** – Invite clients and prospects to your educational event or workshop.
» **Week 4** – Continue planning the event to completion. Make sure to follow up with prospects after the event!

Month 10 – Leveraging COIs

» **Week 1** – Review the Leveraging Centers of Influence course and select the COI approach you want to use.
» **Week 2** – Make a list of ideal Centers of Influence and make a plan for connecting with them using the approach you selected last week.
» **Week 3** – Begin executing on your COI plan. Schedule at least one lunch or coffee meeting with a COI on your list.
» **Week 4** – Meet with your potential COI. Use the COI Profiling Questions resource to better get to know that professional and learn if there is alignment. Choose one or two items from the Tip Sheet for Nurturing COI Relationships to deepen that relationship.

Month 11 – CX: Client Reviews

» **Week 1** – Review the CX: Client Reviews course and evaluate your current review process.
» **Week 2** – Develop and document the client review process you will be implementing using the Sample Client Review Process and Process Template.
» **Week 3** – Create a Client Review Agenda, Wealth Plan Update Form, and important Client Email Templates.
» **Week 4** – Build your client review process in your CRM so that nothing falls through the cracks.

Month 12 – Marketing Plans

» **Week 1** – Review the Marketing 101 course.
» **Week 2** – Use the Marketing Plan Template resource to create a marketing plan.
» **Week 3** – Review Marketing 201 course.
» **Week 4** – Finalize your annual marketing plan, schedule time to review the plan with your team, and take other steps necessary to execute on the marketing plan.

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Month 13 – Prospecting Plans

- **Week 1** – Review the Strategic Prospecting Plan for Established Advisors course.
- **Week 2** – Complete the Annual Prospecting Plan tool.
- **Week 3** – Meet with your team to discuss the annual prospecting plan.
- **Week 4** – Block time on calendars and take other steps necessary to execute on the prospecting plan.

NEXT: Begin Business Builder Implementation Track

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