CARSON
COACHING

Foundational Implementation Track

This track is designed for advisors with $25M or more under management (equivalent of $250,000 of annual revenue). 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 Foundational 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 – 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 – 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 5 – 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 6 – Ideal Client Profile

- **Week 1** – Review the Defining Your Ideal Client course.
- **Week 2** – Work on the Ideal Client Workbook.
- **Week 3** – Continue working 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 7 – 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.

Month 8 – 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 two organizational charts: one for now and one for three years in the future.

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Month 9 – 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.

Month 10 – 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 11 – 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 12 – 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.

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Month 13 – 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 14 – 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.

Month 15 – 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.

Month 16 – 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 17 – Client Experience, continued

» **Week 1** – Review the CCO course that corresponds to your top area of CX priority.
» **Week 2** – Create a detailed action plan to improve your top area of CX priority in the next 3-6 months.
» **Week 3** – Begin implementing your action plan to improve your top area of CX priority.
» **Week 4** – Continue implementing your action plan to improve your top area of CX priority.

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Month 18 – Client Experience, continued

- **Week 1** – Review the CCO course that corresponds to your second area of CX priority.
- **Week 2** – Create a detailed action plan to improve your second area of CX priority in the next 3-6 months.
- **Week 3** – Begin implementing your action plan to improve your second area of CX priority.
- **Week 4** – Continue implementing your action plan to improve your second area of CX priority.

Month 19 – Client Experience, continued

- **Week 1** – Review the CCO course that corresponds to your third area of CX priority.
- **Week 2** – Create a detailed action plan to improve your third area of CX priority in the next 3-6 months.
- **Week 3** – Begin implementing your action plan to improve your third area of CX priority.
- **Week 4** – Continue implementing your action plan to improve your third area of CX priority.

NEXT: Begin Advisor to CEO Implementation Track

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