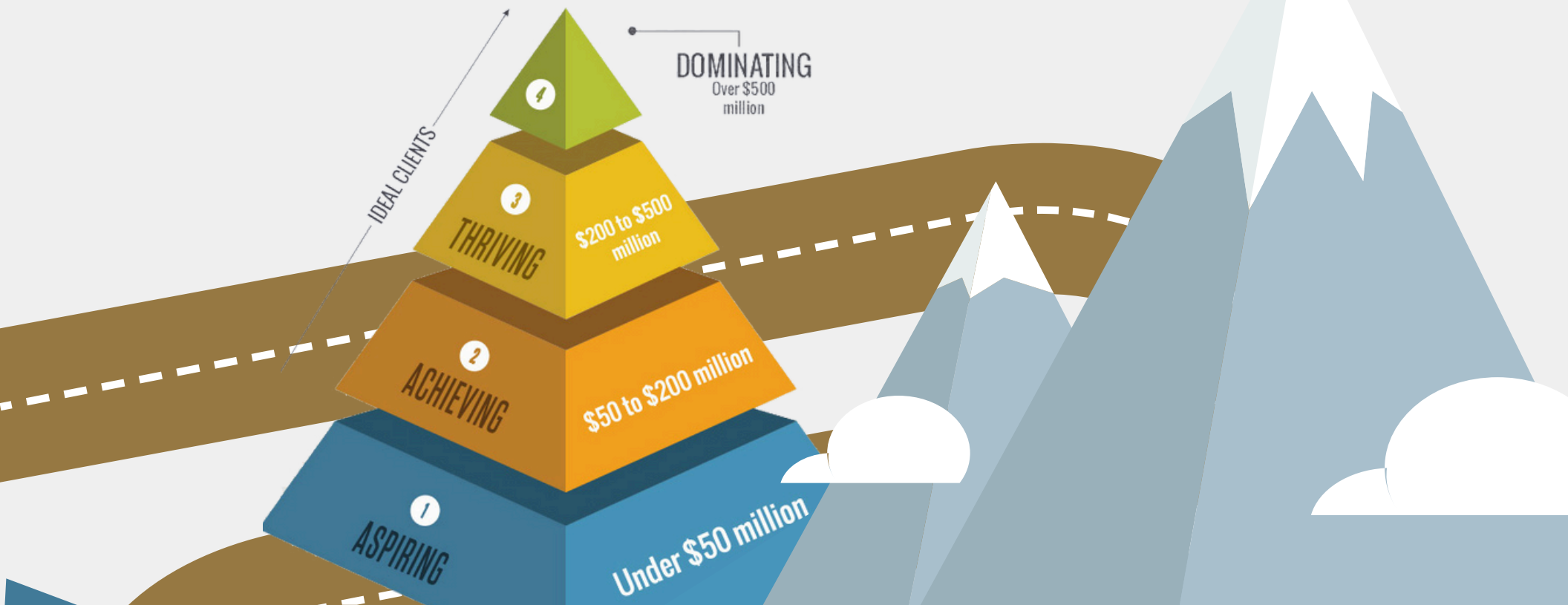


BUSINESS OPTIMIZATION SCORECARD:

Learn How Financial Planners & RIAs
Grow Their Assets Under Management to
\$250MM, \$500MM & More with Greater
Purpose, Productivity & Profits



Greetings!

I am Rob Brown, founder of the Truest Fan Coaching.... a training and coaching consultancy dedicated to helping financial planners and RIAs achieve peak performance in both business and in life.

Congratulations on downloading your copy of my **Business Optimization Scorecard**.

The top way successful advisors eliminate the fear of failure, build confidence in their businesses and regularly achieve new levels of success is by building a system. A system that helps them develop a simple plan that is based on tried and true methods that have been built and tested by other top performers before them.

My Business Optimization Roadmap is exactly that system.

I began building this system during my earliest days as a top-performing advisor, more than 30-years ago. My process grew and improved during my time as the lead advisor of an elite team focused on the investment and financial planning needs of our clients. During many of those years, I simultaneously mentored hundreds of advisors as a manager and as a senior executive.

The Business Optimization Roadmap is based on both experience and results...not just theory.

Back in 2002, I decided to become a full-time executive and business coach. Because, of all the things roles I played as an advisor and leader, I enjoyed mentoring advisors the most. Helping advisors set big goals, create actionable plans and achieve amazing results drives me and my business to this very day.

In the next few minutes, you're going to walk through a simple exercise designed to help you determine your score. You will be scoring your readiness to move to your next level of success in business and in life.

You may find that you're right on track...and that's great. Affirming your readiness will give you greater confidence in your plans.

You may also find that you're not exactly where you need to be... that's okay. Better to know what you need to do to achieve your potential than to sit in the dark of uncertainty.

Please reach out to me if you have questions. I build time into my schedule each week to hold "Strategy Sessions". During our call, we'll talk about your scorecard results and how you might use them to begin building momentum towards your next level of success. You can go here to schedule a time to speak:
<https://truestfan.com/apply/>.

Rooting for your success!

Robb



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FOUNDATION

PICTURE SUCCESS



EACH OF THESE QUESTIONS IS TIED TO THE 9-STEPS OF THE TRUEST FAN BUSINESS OPTIMIZATION ROADMAP

Score your answers by placing a 1, 2, or 3 in the box.

STEP 1 – DO YOU HAVE A VIVID MENTAL PICTURE OF WHAT YOUR FUTURE SUCCESS WILL LOOK LIKE? Before you can begin to implement a plan to reach your next level of success, you must have a mental picture what your achievements will look like. The more vivid and clear the image in your mind's eye, the better. Like a racer picturing the finish line before the sound of the starter's gun...you must envision your victories. Where will you be? Who will you serve? How will you feel? Who will be surrounding you? How will you describe your accomplishments?

"No" = 1 point.
"Not sure" = 2 points.
"Yes" = 3 points

ULTIMATE CLIENT EQUATION



STEP 2 – DO YOU HAVE A CRYSTAL-CLEAR GOAL FOR THE NUMBER OF IDEAL CLIENTS YOU WOULD LIKE TO SERVE AS YOU GROW TO YOUR NEXT LEVEL OF SUCCESS? Once you picture your success, you need to begin to break it down into meaningful and actionable goals. And while thinking about AUM and revenue goals seems natural, stating your goals in terms of your ideal clients will help you grow while serving the clients you enjoy working with the most. You must start with a crystal-clear definition of your ideal client; measure the number of ideal clients you are serving today; and then set clear goals for how many new clients you need to add to achieve your next level of success. The difference between where you are today and where you would like to be is your success gap. Closing that gap by implementing actionable strategies will help you realize your vision.

"No" = 1 point.
"Not sure" = 2 points.
"Yes" = 3 points

SUCCESS HABITS



STEP 3 – ARE YOUR DAILY SUCCESS HABITS ALIGNED FOR PEAK PERFORMANCE? With a clear vision and actionable goals, you have a roadmap for future success. Now, you must determine the best fuel to energize your pursuits. The fuel will be your success habits... those things you commit to doing every day that set you up to be the best version of yourself. Allowing you to truly reach your peak performance level. True champions understand that victory isn't an isolated event, it's the culmination of preparation and training.

"No" = 1 point.
"Not sure" = 2 points.
"Yes" = 3 points

ELEVATION**SIGNATURE
SOLUTION****STEP 4 – DOES YOUR SYSTEM FOR SHOWCASING YOUR BUSINESS TO YOUR IDEAL AUDIENCE ACCURATELY REFLECT YOUR UNIQUE CLIENT PROPOSITION?**

In an industry filled with copycat marketing, it's essential to showcase your story by emphasizing the way you uniquely serve your clients. Your Unique Client Proposition (UCP) is the path over which you help the clients you choose to serve get from where they are today to where they would like to be in the future. Your UCP is NOT the tools you use or the strategic partners you work with, it's your ongoing client deliverables. The way you show up in your clients' lives to set goals, implement plans and keep them on track.

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"No" = 1 point.
"Not sure" = 2 points.
"Yes" = 3 points

ADVOCACY**STEP 5 – DO YOU RECEIVE A CONSISTENT FLOW OF REFERRALS, INTRODUCTIONS AND LEADS FROM YOUR CLIENTS, INFLUENCERS AND COORDINATED MARKETING INITIATIVES?**

Your Future Client Quotient (FCQ) is your gateway to growing your business around your ideal clients. Whether you're using traditional marketing strategies or more sophisticated lead generation tactics, you must keep your pipeline full of the right number of qualified prospects. And this does not need to be a series of high volume, "let's see what sticks" initiatives. Calculating your FCQ, choosing the right strategies to match your business style and then measuring your ROI will be your best path to a consistent flow of ideal prospects.

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"No" = 1 point.
"Not sure" = 2 points.
"Yes" = 3 points

**SOLUTION
SELLING****STEP 6 – DOES YOUR SOLUTION SELLING SYSTEM (SSS) PUT YOU IN A POSITION TO SOLVE YOUR IDEAL CLIENTS MOST IMPORTANT CHALLENGES?**

Selling is not a bad word. Done right, it's both the way we get paid and, most importantly, the way we help our clients solve their greatest challenges. Get it right, your SSS is the ticket to both smoother client relationships and less complicated prospect nurturing cycles. Remember, you're not selling a plan or a portfolio. You're providing solutions to the goals and aspirations your current and future clients deem most important.

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"No" = 1 point.
"Not sure" = 2 points.
"Yes" = 3 points

MASTERY**AUTOMATION****STEP 7 – ARE YOU AUTOMATING YOUR RECURRING PROCESSES AND ROUTINES TO MINIMIZE REPETITION AND SAVE VALUABLE TIME?**

As you continue to scale your business, you begin to see an ever-increasing number of recurring activities. Whether they relate to increased client care, building an even stronger team or improving your ideal client acquisition results...often times, they should be automated. Automation improves both performance and productivity and leads to mastery. Allowing you to grow more quickly without adding hours to your days.

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“No” = 1 point.

“Not sure” = 2 points.

“Yes” = 3 points

DREAM TEAM**STEP 8 – HAVE YOU SURROUNDED YOURSELF WITH TEAMMATES AND STRATEGIC PARTNERS WHO WILL HELP YOU ACHIEVE YOUR DREAMS?**

Team building is essential even for the smallest of teams. The way you team with even a single associate will help assure your path to mastery. Strategic partners and virtual assistants, who may not sit in your office every day, should understand how important they are to you are your success. And as you grow your team with specialists, you must make sure you're filling the right seats with the right people. Even the greatest conductor can't lead an orchestra filled only with violin players.

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“No” = 1 point.

“Not sure” = 2 points.

“Yes” = 3 points

LEGACY**STEP 9 – ARE YOU BUILDING A LEGACY THAT WILL INCREASINGLY ALLOW YOUR BUSINESS TO RUN WITHOUT YOU?**

Over time, one of the greatest milestones of a business is that it doesn't rely primarily on the performance of just one team member...even if that person is the CEO, founder or owner. Mastery requires legacy thinking. Is my business becoming less and less dependent on me? Do the important people in my life, including my teammates, understand where we're headed? Do I have, at minimum, a five-year succession plan in place? Can I take immense pride today in the way my business has been built for the future? Building your legacy is like writing an autobiography...will it be a book worth reading?

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“No” = 1 point.

“Not sure” = 2 points.

“Yes” = 3 points

WHAT IS YOUR TOTAL SCORE?



Understanding Your **Business Optimization Scorecard**.

If your score is...

...between 24 and 27 points, you're **DOMINATING**. You feel assured with a sense of both freedom and accomplishment. With continued attention to the Mastery Stage, focusing on teamwork, authority and longevity, you will build and even stronger business that reflects the characteristics of a market leader. Over the next 90 days, dig deep, study your business, strive to reach the point where you can confidently answer "yes" to all the scorecard questions. .

...between 17 and 23 points, you're **THRIVING**. You most likely feel impatient because you're more excited about growth than you ever have been before. For you, the next level of success, can't happen fast enough. But with continued attention to both the Elevation and Mastery Stages, focusing on systemization, automation and teamwork, you will be rewarded. Next level progress will gain incredible momentum. Over the next 90 days, review, update and implement action steps to set yourself on a trajectory to reach the Dominating level the Truest Fan Roadmap.

...between 11 and 16 points, you're **ACHIEVING**. At times, you may still feel overwhelmed by your business. Time, energy and effort are at a premium. For you, the next level of success, requires focus on making your client care and marketing routines as memorable, repeatable and referable as possible. Focus on the Elevation Stage with special attention to closing your success gap by strengthening both your Unique Client Proposition (UCP) and your Solution Selling System (SSS). Over the next 90 days, review, update and implement action steps to set yourself on a trajectory to reach the Thriving level the Truest Fan Roadmap.

...10 or fewer points, you're **ASPIRING**. You're scrambling...probably trying to be different things to too many different types of prospects and clients. You need to focus on developing a clear vision as well as an ideal client focus. No business can thrive over the long run without a solid foundation. Don't put it off. The effort you apply to the Foundation Stage today will pay many dividends as you move to higher and higher levels of success. Over the next 90 days, review, update and implement action steps to set yourself on a trajectory to reach the Achieving level of the Truest Fan Roadmap.

