

The Mindset Method Systematize & Grow Your Practice

Mindset Consulting is pleased to offer you a comprehensive, Best Practices program that will help you **completely systematize and meaningfully grow your business**, giving you perfect vision for this year and beyond. This program is perfect for the entire team.

This program doesn't just have you **doing things differently**, it has you **thinking differently**. This is a major factor in why this program will serve you for the rest of your career.

This program is best suited for advisory teams who are motivated to implement a full suite of best practices to enhance and grow their business by delivering an exceptional client experience. This is achieved through full integration of people, process & technology.

The Mindset Method

Pillar 1
Client Analysis
[Click here to learn more](#)

Pillar 2
Client Experience
[Click here to learn more](#)

Pillar 3
Client Onboarding
[Click here to learn more](#)

Pillar 4
Client Rebranding
[Click here to learn more](#)

The Mindset Method Approach

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How can it help me?

It will help organize, streamline and unify your people, processes, systems and technology. Refer to the next page for a description of the 21 core best practices covered in this program.

The Mindset Method Curriculum

Although our program covers many core best practices, they are easily defined as the **4 Pillars of Success**. Each of these pillars play a critical role in your ongoing success. With our solutions, you can walk through each best practice in a sequential and manageable manner and in the process, ensure that you control your business instead of it controlling you.

In addition, you will learn how to fully integrate people, processes, and technology to ensure your business is profitable, proactive and operating with turn-key precision. Throughout the entire program, you will have access to everything you need to be successful. There are resources for *every* step of the way including letters, agendas, call & meeting scripts, introduction kits, graphics, and other terrific client-facing resources that enhance your branding.

PILLAR 1: CLIENT ANALYSIS

1 Welcome & Introductions

- Review of our philosophy and approach
- How to succeed – getting you started on our best practices

2 Your Vision

- Understand your motivations and identify your unique goals
- Proactively organize time and create time scarcity
- Create a model week, including defined client meeting days

3 Client Classification

- Establish a framework for relationship-based client classification and future growth – sort and organize every one of your clients
- Take charge of determining the type of clients you want to work with

4 Right Sizing

- Apply the client classification framework to gain clarity on where the value exists within your business
- Maximize advocacy with a relationship-based classification process
- Know your options for realigning clients



PILLAR 2: CLIENT EXPERIENCE

5 Client Profiling

- Get to know your clients beyond the money and deliver highly personalized service they will value and tell others about

6 Client Service Model (*Create brand loyalty with a Client Experience*)

- Don't give clients what they expect, give them what they will love
- Create a proactive client service model with a variety of activities
- Strategically apply your time, energy and resources

7 Client Events

- Show your clients and those they care about a great time with events just right for them
- Continue to build a practice of exclusivity with strong bonds to brand loyalty
- Learn how to integrate virtual events for clients at a distance

8 Client Communication

- Make sure your client communication is consistent across the board
- Create a professional Introduction Kit to anchor your branding
- Review of your Website and LinkedIn Profiles

9 Referrals (*A refreshing departure from the typical approaches*)

- Never ask for referrals again
- Embrace a referral process your top clients will actually appreciate



PILLAR 3: CLIENT ONBOARDING

10-15 Client Onboarding

- A comprehensive approach to differentiate your branding and ensure only the right client get the opportunity to work with you
- Create a unified and consistent message and process for working with your clients through their lifetime

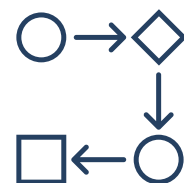
Pre-Appointment Process

The 1st Appointment – Is there a FIT?

The 2nd Appointment – Fact Finding

The 3rd Appointment – Implementation & the PFO

New Welcome Process



PILLAR 4: CLIENT REBRANDING

16-18 Client Rebranding (*A lucrative business development initiative*)

- Your top existing clients need to understand and experience the evolution of your business
- High value relationships will increase engagement and move forward in a spirit of mutual trust and cooperation

1st Rebranding Appointment

2nd Rebranding Appointment & Welcome



19 Review Meetings

- Apply a consistent Review Meeting framework to maximize results of your approach
- Create a highly structured and proactive Review Meeting process so everyone on the team can easily support it

20 Strategic Partners

- Build your network of Strategic Partners to increase external referrals
- Maximize trust and results by managing these relationships proactively

21 The Road to Success

- Conduct an Annual Best Practices Checkup to keep your advisory team on track
- Implement Weekly Team Meetings to ensure continuous communication
- Engage in Quarterly Strategic Meetings to have regular check ins throughout the year