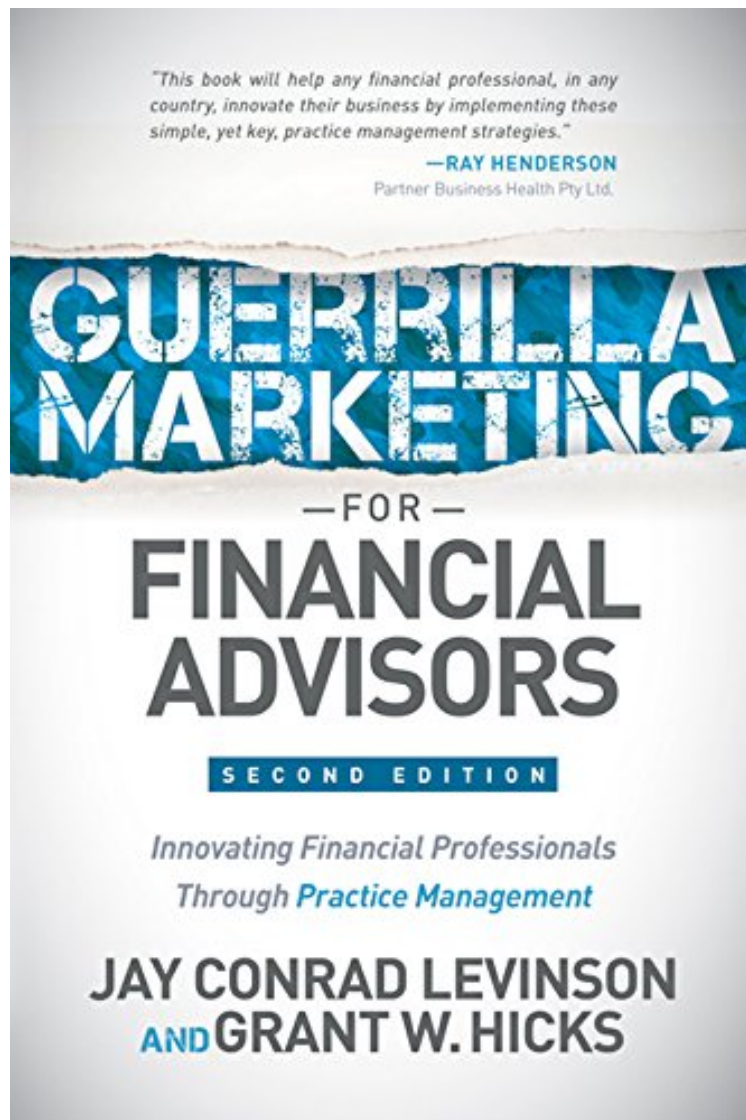


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Guerrilla Marketing for Financial Advisors: Transforming Financial Professionals through Practice Management

Jay Conrad Levinson, Grant W. Hicks
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challenges of running a financial planning practice is that it has a lot of moving parts and can get quite deep, quickly. The beauty of this book is that it dramatically eases the learning curve and creates an effective, and practical application that's simple - anyone can use the tools in this book. Further, Grant accomplishes this without losing any of the powerful impact processes' can have on a business. The book is step by step with thorough, clear examples, so the reader feels prepared and ready to go. It is great for, really anyone who wants define their business according to THEIR best way of doing things. 0 of 0 people found the following review helpful. Must Read! By Richard D. Campe If you are an Advisor, Manager or Coach and have a pulse this is a must read! Grant is the best of the best at understanding how Advisors take a business past the ceiling of complexity. He walks the talk and brings the real deal. He's an avalanche of ideas all neatly articulated in this profound and easy best seller. Don't wait. It's a must read today! Rich Campe CEO, ProAdvisor Coach 1 of 1 people found the following review helpful. Nice. By Bill Bachrach Simple, action-able ideas that produce results. Nice.

The number one issue for financial professionals is capacity. What is the number one way to constantly build capacity in your financial services business? What blind spot is holding you back from achieving more? Does it seem there is never enough time to grow? It's time for you to implement the missing practice management processes into your financial business so you can build your ideal business. Based on extensive financial industry practice management research, proven marketing strategies from Guerrilla Marketing legend Jay Conrad Levinson and over 27 years of unique financial industry experience, Grant Hicks has created simple yet easy to implement strategies for any financial professional to build and manage capacity in their practice. Research shows that a majority of financial professionals do not have detailed practice management processes including: a unique value proposition clearly articulated, a formal feedback system for clients, a clear definition of an ideal client and a process for attracting ideal clients. Learn strategies to build your ideal capacity, and increase your revenue by up to 33%, through unique practice management processes. Quickly learn how to: Identify and attract better ideal clients to manage your growth effectively Manage your time to achieve consistent double digit growth and manage capacity issues Gather more revenue and get more referrals by implementing proven processes Inspire clients to act quickly through articulating your ideal client experience and case studies Build key practice management processes to build ideal capacity such as feedback and your value proposition Save yourself valuable time. By implementing just one new process, you will be on the path to your ideal capacity and ultimately your ideal practice.

About the Author Grant Hicks, CIM, is a practice management capacity consultant. In addition to being an author and a popular keynote speaker at many conferences, Grant runs a training and coaching program for top financial advisors. He is the founder and National Director of Practice Management at www.advisorpracticemanagement.com with 27+ years of unique experience in the financial services industry. Grant is best known for co-authoring "Guerrilla Marketing for Financial Advisors" with Jay Conrad Levinson. Excerpt. copy; Reprinted by permission. All rights reserved. You don't need to be a mechanic to know the effects of a car not firing on all six cylinders. If one cylinder is not working to the best of its ability and it is completely blown, then what happens to the car? How does this affect the gas mileage and horsepower and performance? What type of confidence does it give the driver when they need to pass someone? I will discuss the six steps or cylinders as it relates to getting the maximum horsepower out of your practice. This book is written for the dedicated financial advisor who is developing his or her career and has the desire to go to THE NEXT LEVEL. The next level, however, needs to be defined. Running a growing practice for twenty years, I wish I had had the time to learn all about these great practice management processes. The challenge for me was always finding time to work on my business, not in the business. It hit me on a quiet Saturday when my wife stormed into my office and said, "Get in the car, we need to change things today." I was working long hours for too long and I was well past capacity in my practice. I got in the car and asked her, "Where are we going?" She drove silently for a few minutes and drove up to a house that I did not recognize. "What are we doing here," I asked? She replied, "See that camper for sale in the driveway? We are buying it and taking the kids camping so you can stop working the way you are." She was right. It took my wife to see what I could not see, and realize that I was well past my ideal capacity. It was a major blind spot in my business and my life. I have dedicated this book to my wife Kim and my kids with whom I had a great time camping with that summer and many more. I want to help advisors identify their potential blind spots and capacity issues that it took my wife to discover. I call it capacity practice management, and will share all the research and numbers until the cows come home to prove to you that it works for top advisors and can work for you in your practice. I'll start by illustrating a great study done in the United States by Think advisor, pursuing practice excellence. The study results are interesting, as advisors measure client satisfaction very high, yet a majority do not have a formal feedback system to measure client satisfaction. In a later chapter, I will address the client satisfaction issue by helping you implement a formal feedback system into your practice. Who is training you on practice management? When we got into the financial services business, there was no school of practice management. How do you learn about the key processes that successful advisors have? Let the pages ahead of you guide you toward finding the key processes, so you can reach your practice

goals. The financial industry realized that it is very expensive to train advisors. We want this book to be a solid investment into your practice. This book is a guide to key practice management processes. I highly recommend that you work through this with another advisor, which will help you get the most out of it. Together you can bring the pages to life with dialogue. It is the dialogue that helps advisors implement strategies. Just reading this and putting it on the shelf will not help you get the most out of this material. Our aim here is to build key practice management processes into your business. Challenge the processes and add dialogue and you will find that the ideas become transforming for you, and the person you discuss them with. Consider a manager, mentor, coach wholesaler or associate, someone to give you feedback and healthy discussion. This book will add value to your business, make you think of practice management and marketing, and help you develop great relationships. Relationships with your clients, their friends, and their families that will last decades. Map it out. It is like going on a long road trip. Would you drive across country without first trying to determine the most efficient route (of course these days you could just use your GPS app)? However, this is no ordinary road trip. This trip is going to last for the next 5 to 10 years or more. You need all six cylinders of your car (or business) to be firing to get the maximum performance on this trip! Where does your practice need the most help?