

THE LEGACY ADVISOR GROWTH BLUEPRINT™

Systems

Systems should always be focused on tasks that must repeat. Their design is to ensure repeatability. All businesses have repeating functions, and until attention is brought to securing repeatability, growth is hampered, and profit is constrained.

What are the most common repeatable actions in your business? Describe them briefly. Then score them in importance with 1 being most important, and 7 being least.

Action	Brief description	Importance
1.		
2.		
3.		
4.		
5.		
6.		
7.		

For each of the top three Systems, identify the steps in the repeatable process:

System	System	System
Repeatable Steps	Repeatable Steps	Repeatable Steps
Improvement Actions	Improvement Actions	Improvement Actions

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Why Grow?

Growth isn't for growth's sake, it's for your sake, the sake of your team and the sake of your clients. Growth is not about more, it's about a constant expansion of the abilities, capacities and impact you and your team can make on your clients' lives, and by extension, your own. It is a challenge to activate the best in everyone involved, and you're rewarded for meeting that challenge.

Differentiation

"Difference" helps the brain recognize that one thing is not like another. The advisory space demands differentiation that starts with the difference you create in your clients' lives, and results in marking you as "not like" the thousands of other advisors in the market.

Capacity

Growth rarely happens without a shift in the capacity of the advisor, your team, and/or your clients. Until we can expand our capabilities, and focus our attention and action accurately, growth evades us.

Systems

A system is a series of repeatable tasks. Until you can repeat something, you cannot improve it. Once the right actions are decoded, systems become the future of your success.

Growth Action List:	Completion Date:	Who:
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

I'm committed to taking these growth actions.

Signature

Date

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Differentiation

Articulating and demonstrating how your business creates a difference in the lives of your clients is central to your growth. There are four categories of Differentiation: What, Who, How and Why. Consider the four and rank them in order of which is the most important in your business in demonstrating meaningful difference.

Rank	Method
	What – the types of solutions you provide.
	Who – the niche you serve.
	How – the method by which you serve them
	Why – the purpose behind your work

#1: _____
List 8 actions you can take to clearly demonstrate this difference to your market.

#2: _____
List 6 actions you can take to clearly demonstrate this difference to your market.

#3: _____
List 4 actions you can take to clearly demonstrate this difference to your market.

#4: _____
List 4 actions you can take to clearly demonstrate this difference to your market.

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Capacity

Businesses are limited by constraints that are often a function of preference, rather than absolutes. Working with Capacity happens in two ways: expanding capacity, or narrowing focus. Combining them is optimal. At the same time, Capacity issues present themselves on three playing fields: your capacity, your team's capacity, and your clients' capacity.

What evidence do you see of constrained capacity:

Yourself	
Your team	
Your clients	

CAPACITY-SHIFTING ACTIONS

What are potential actions you can take to shift capacity in your business?

	Self Capacity	Team Capacity	Client Capacity
Expand			
Focus			

What are 4 actions you will take to increase capacity?

Item	Immediate Action