



# LEGACY

*A Legacy for Your Business*





# Introduction

*Welcome to the Legacy Stage!*

*If you're going to work hard, you may as well work to build something with enduring value.*

It might endure because it carries on beyond you, or because of the impact it makes in people's lives, or it funds something meaningful to you - or it could be all of those.

Everyone has a bigger impact and creates bigger results when we're working at something greater than ourselves.

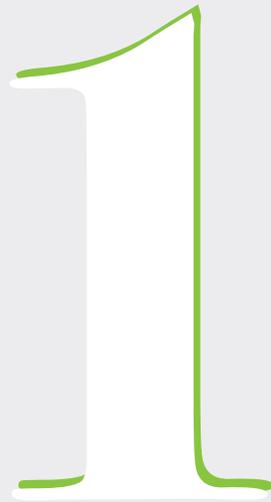
The Legacy Stage digs into that, and will help you look at the near and distant future of your business and help you take action on it.

As always, if you start to feel stuck, reach out to our Advisor Success Team.

Welcome to the Legacy Stage.

# Module 1:

## Rapid Recap



*Planning is bringing the future  
into the present so that you can  
do something about it now.*  
- Alan Lakein

# Lesson 1: Milestones

## Key Takeaways

There are 3 milestones you'll reach in this stage:

1. You'll have a clear vision for the next iteration of the business you are building
2. You'll have fine-tuned your process to create the perfect client experience for your niche
3. You'll have taken steps to put Vision accelerants in place for you and your business

The Legacy Stage is about pre-invention. It's coming up with the picture of the future, creating the next plan, and then acting on it to make it a reality.

This is not only about your future, but about designing a future that will capture what matters most to you and seeing it continue forward in time.

It's about making an impact beyond you.

# Module 2:

## Vision for Your Future



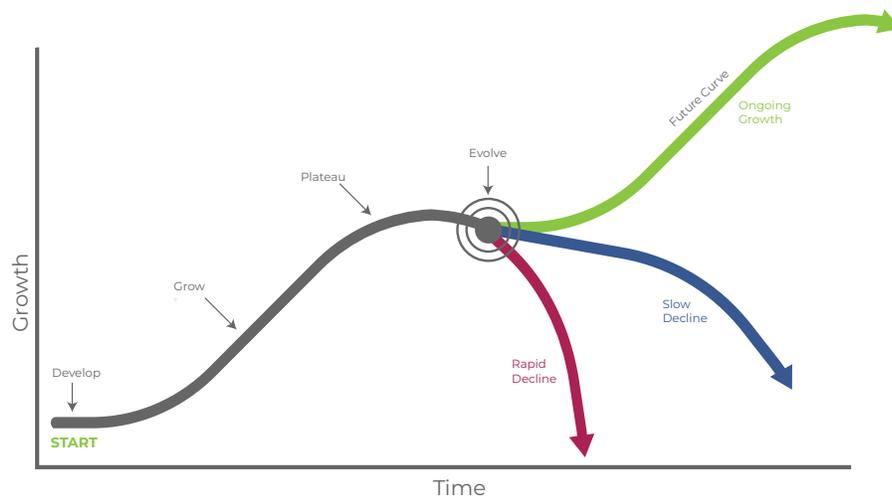
*The time to repair the roof is when  
the sun is shining.*  
- John F. Kennedy

# Lesson 1: Your Future and the “S Curve” of Business

Businesses move through “S curves” of progress.

On a graph of Results over Time, a business starts with no results, and then you start to deliver a product or service and it grows. It will grow until it hits an inflection point where you can't grow or improve any further without a meaningful shift. When you hit this point, one of three things happen to the business:

- 1 It goes into a slow, gradual decline or becomes stagnant
- 2 A bad decision is made and it goes into a rapid decline
- 3 A useful innovation is made and it begins its next upward growth phase



Each time the business hits constraints that throttle its growth, it meets an inflection point where a good decision needs to be made.

How you approach those plateaus will determine your future and the future of your business.

What we'll do together in the Legacy Stage is improve the odds of you creating the clients, the business and the life you want.

# Lesson 2: Clear Targets

You cannot hit a target you cannot see.

When you're clear on your Vision and Goals, your brain starts to know what to look for - and it finds things all over the place to help you.

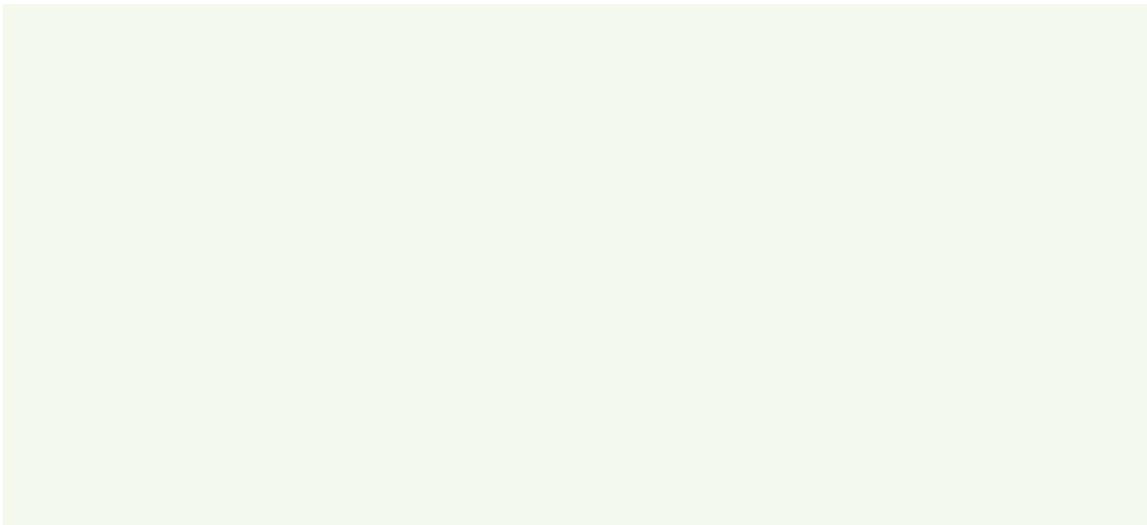
You have to have a clear picture of the future you want to create.

Getting clear about what you want doesn't have to be hard, but it does warrant some of your time, so let's do exactly that.

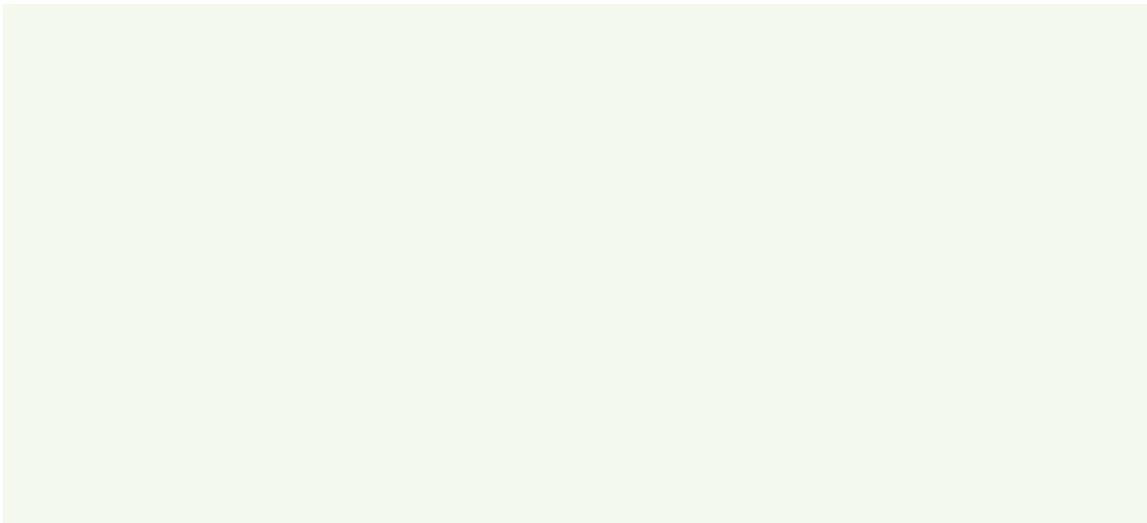
# Lesson 3: What Do You Want?

You learned how to help a client articulate their Vision in the Deliver Stage. Now, let's apply that same process to your business.

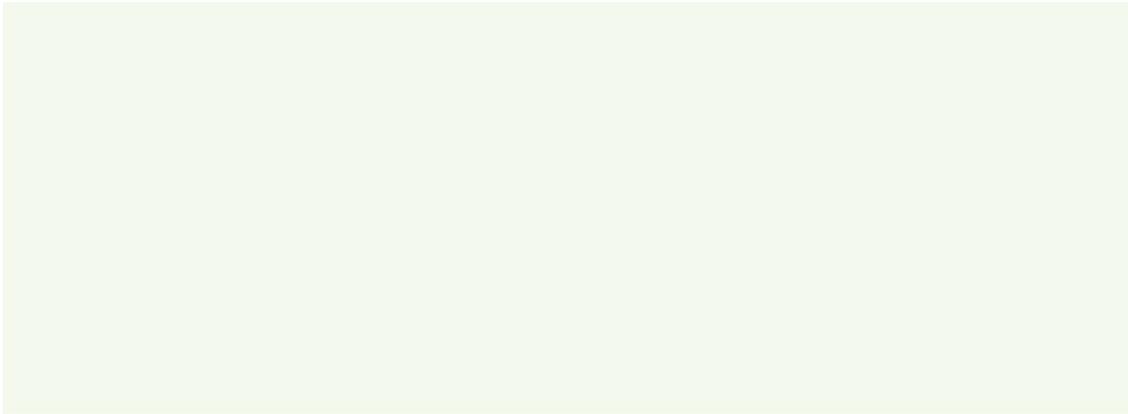
- 1 Do you have a sense of what you want the future to look like for your business? What's happening? What kind of clients, what kind of team, what kind of experience or impact?



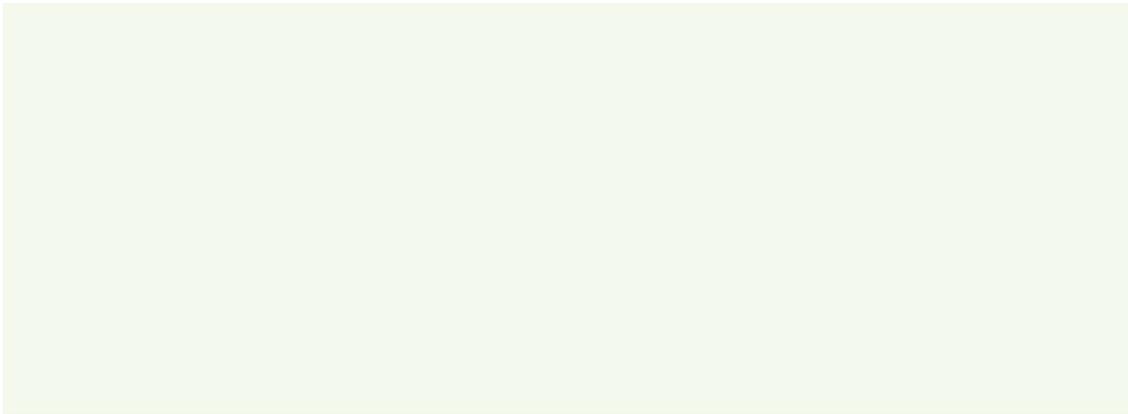
- 2 How would you know if you created a successful business? How would you know it was successful?



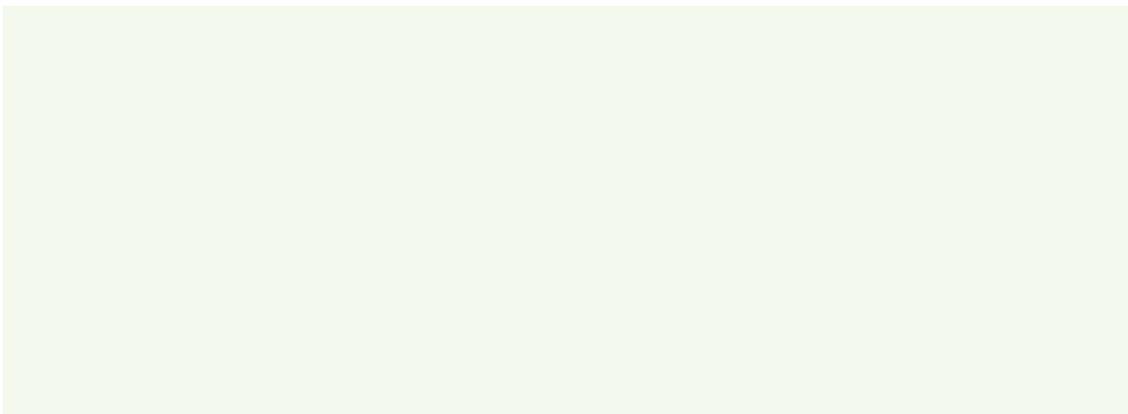
3 If you were guaranteed to succeed at building the business you really want for the future, what would you do?



4 What are 5 things about your business that you want to be proud of in the future?



5 What is it that you want the business to have, be, and do?



- 6 What will be happening in your business in 10 years? What won't be happening?

Now, review your answers and consider this: **is this really what you want?**

You're going to pay for it in time, money, attention, relationship, energy and more. You're going to trade whatever future you're pointed toward right now for the future you're mapping out.



**Action task:** Write down your answers to the Vision questions above. Then review them to make sure it's what you really want for your future.

**YOUR VISION:**

# Module 3:

## Acting on Your Business Future



*Our goals can only be reached  
through a vehicle of a plan,  
in which we must fervently  
believe, and upon which we  
must vigorously act. There is  
no other route to success.*  
**- Pablo Picasso**

# Lesson 1: How Does Business Structure Anchor Clients?

Your business future will be the result of a combination of these three things:

- ✓ **Thought** – Vision clarifies your thoughts for how you want the business to be in the future.
- ✓ **The Right Knowledge** - The Advisor Growth Journey - both core content and expert content - gives you the right knowledge to act.
- ✓ **Supported Action** - Action that's encouraged, augmented, and even challenged by like-minded peers comes through your actions and the support of the Legacy Advisor Growth Network. When you add in webinars, additional curated content, master classes and access to coaching and master minds - you have everything you need to create the future you want.

To start to put this together, we have a tool for you to use to think through some specifics - it's called the Advisor Growth Blueprint.

Growth in an Advisory firm is usually constrained by three things: **Differentiation, Capacity** and **Systems**.

**Differentiation:** The Advisory space demands differentiation that starts with the difference you create in your clients' lives, and results in marking you as "not like" thousands of other Advisors.

**Capacity:** Growth rarely happens without a shift in the capacity of you, your team, and/ or your clients.

**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.

With your Vision in mind, it's time to work through Differentiation, Capacity and Systems.



**Action task:** Complete the Advisor Growth Blueprint so you have a specific set of actions to take to move you forward.

## THE LEGACY ADVISOR GROWTH BLUEPRINT™

### 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.

# THE LEGACY ADVISOR GROWTH BLUEPRINT™

## 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.


# THE LEGACY ADVISOR GROWTH BLUEPRINT™

## 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?			
	<b>Self Capacity</b>	<b>Team Capacity</b>	<b>Client Capacity</b>
<b>Expand</b>			
<b>Focus</b>			

What are 4 actions you will take to increase capacity?	
<b>Item</b>	<b>Immediate Action</b>

# 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
<b>Repeatable Steps</b> . . . . . . . . . . .	<b>Repeatable Steps</b> . . . . . . . . . .	<b>Repeatable Steps</b> . . . . . . . . . .
<b>Improvement Actions</b>            	<b>Improvement Actions</b>            	<b>Improvement Actions</b>            

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

# Module 4:

## Vision Accelerants



*One 2 x 4 beam can support 607 pounds, but two 2 x 4s nailed together can support not just 1,214 pounds (which is what you'd expect), but a whopping 4,878 pounds! So it is with us. We can do so much more together than we can alone.*

**- Sean Covey**

# Lesson 1: Obsession

The desired future state you have for your business will not happen.  
**That vision must be made to happen.**

Your thoughts, action, team, knowledge and influences must all be ordered to support the creation of that future - and then you need to put a lot of energy into it.

Until your vision is an obsession, it won't happen.

However, if you remain focused and attentive to everything that can contribute to it - directly or indirectly - and you act on the opportunities to make those contributions, things move.

Commit to the picture you have of the future.

# Lesson 2: Not on Your Own

The key reason people hire coaches, or join study groups or masterminds is that it moves them toward the future they want, faster.

Sometimes working one-on-one is best because your situation is unique, or you don't want the distractions of others, or you just need the direct support to move you forward.

Other times group engagements work better because you want the support and participation of other Advisors who have experienced the same things, and you also want to help other Advisors through the support, insights and ideas you have.

**Here are five things you should think about before you engage in coaching or decide to participate in a mastermind:**

- 1 Do I want to create a result quickly?** If the answer is yes, and you've been working at it for a while but haven't gotten where you want to, coaching is probably a good idea.
- 2 Do I need more information?** This is a slippery question because it's not uncommon to think we need more information, or get so caught up in analysis that we never act. However, there are times where you simply need to get access to the right information to move forward - that's usually a good time to engage a coach.
- 3 Do I need better accountability?** Sometimes you know what you need to do, but you know that with better accountability, you'd move faster. That's a good sign you could use a coach.
- 4 Am I doubting myself?** Are you doubting that you can achieve what you're considering, or doubting your ability to get it in the timeframe you're considering? That can be a good sign that a coach can help keep you focused and remind you of what you're really capable of.
- 5 If I achieved what I wanted in terms of growth, progress, or mastery, would the returns dwarf the investment?** If it's a yes, that's probably something to act on.

Your future is your responsibility. No one else's. And when you take command of it your Vision becomes possible.

A coach or a mastermind group will accelerate the achievement of your goals and move you closer to your Vision, faster. Period.



**Action task:** Complete the Vision Accelerant Filter and decide whether or not, now is the time for coaching.

## VISION ACCELERANT FILTER

**VISION:**

Assess whether or not you need to add Vision Accelerants to your plan:  
Coaching, Study Group or Mastermind

QUESTION	SCALE OF 1 - 4
<p><b>FAST PROGRESS</b> Do I want to create a result/massive progress quickly?</p>	1   2   3   4
<p><b>CURATED INFORMATION</b> Do I need more/better information than I have easy access to?</p>	1   2   3   4
<p><b>BETTER ACCOUNTABILITY</b> Do I need better/more rigorous accountability?</p>	1   2   3   4
<p><b>DOUBT</b> Am I doubting myself or how I'll accomplish my vision?</p>	1   2   3   4
<p><b>RETURNS &gt; INVESTMENT</b> Are the Returns of achieving my vision much greater than the cost?</p>	1   2   3   4
<p>If your score is &gt;10, have a conversation with Legacy's Advisor Success Team about accelerating your Vision.</p>	<p><b>SCORE</b>                      /20</p>



**The Legacy Companies, LLC**  
P.O. Box 737 | Marshfield, MA 02050  
(888) 649-4591  
[www.think-legacy.com](http://www.think-legacy.com)