THE ACCELERATOR METHOD WORKBOOK

LISA CAMPBELL PROFIT COACH

ACCELERATE 2 ADVISOR

Worksheet

This workbook will be your notes, your planner, and your play-by-play process to get out of overwhelm & compliance and positioned for high-value advisory work.

Follow along each day LIVE with Lisa in the Accelerate 2 Advisor Group to complete your worksheets. Remember to show up live every day and post your homework in the group to qualify for the giveaways!

Session 1

The Path To Freedom and High Value

The goal is to set our business up so that we're _____________________ the ___________ who want the ______________________ we provide and so that we're not the ones doing all the _________________.

This way we can build a __________that supports us as we _____________.

Any course, program, webinar or bootcamp that focuses on ________________________ such as ___________________,_______________________, or _____________________, may produce results in one specific area but is lacking in _________________. Knowing what to do, in which order & _________ will ____________________ your transition to advisor.

The 4 pillars of The Accelerator Method:

1) ____
2) ____
3) ____
4) ____

The Accelerator Method provides action items and _______________ to get you out of doing the ___________________ work & overwhelm while ___________________ your _____________________ to your clients.

On Your Own:

Let's talk about your current situation.

1. The most important goal for me is ____
2. I know I need to work on ____
3. I am the bottleneck in my business growth because I continue to _____________________________
____
4. If I don't take action to create change in my business, I'll never be able to ____________________
____
____
5. If I do take action my life will be so much easier because ___________________________________
____
____
6. The number one reason I haven't fully repositioned myself is: ________________________________
____
____

(Guess what? You've already taken action – you're here, investing your time in this masterclass series)

7. Is this true or false for you: If someone would show me exactly what to do, I'd do it!

TRUE_____ FALSE_____

-ACTION ITEM-

When you see our Session 1 Homework thread in the group, comment with your answer to #3.

Posting means you're entered to win the next giveaway!

Session 2

Pillar 1: Attract The Right Clients & Position Your Value

Your compliance value to the client is not ______________________. What you charge for compliance work is based on _______________ that you have, that your clients ________. Not by __________________________it takes you.

Your ___________________________________ is determined by everything you do outside of ____________________________.

That includes:

Urgency, additional or customized _________________, _________________, meetings, strategy, etc.

Anything that sets you __________________from what a ______________ or ______________________ bookkeeper would do.

Every ___________________________ you create needs to clearly identify what you do for ________________________ and what you do that ______________________.

Knowing how to ______________ the right ______________ starts with analyzing your ______________________________.

This is going to help you identify who you want ___________ of and who you want _________________ of. Examine the _______________of the ______________ you want more of and make those part of your ___________________ & _________________________system.

Speak directly to your _________________________ in your _______________message across all_________________________. Promote your ___________________&_____________, not your _____________________ or _____________________________. (Those are expected)

When you promote your ________________ & _______________, prospects already know you're not the average __________________________.

What you say to them via your _______________ presence & universal _________________ is what's going to:
a) ____ and
b) ____

Don't spend time entertaining every ___________ that comes your way. You want to ________________________ them automatically.

THE INTAKE SYSTEM:

__Step 1__: Design an intake ____________ that asks the _________________ you want _________________ before you get on a __________________________________. These ____________________ should be indicative of your ___________ client ____________.

__Step 2__: Create an __________________________ that contains a link to your ______________________.

__Step 3__: Create a second _________________________ with a link to your ________________ for qualified leads.

__Step 4__: Create a third ____________________ template to send as a courtesy to anyone who completes the _____________ but is not a ________. Offer other _________________.

This can be done through your ______________, or through your ______________________ as you grow, you'll add more ____________________________ to help you _____________ your processes.

This process alone will free up __________, put the _______________________ in front of you and increase your __________________________.

On Your Own:

Looking at the clients you currently have, what percentage of them do you really enjoy working with? ____________________%

Do you have any clients now that you wish you could fire?_______

Are you able to identify why you don't like working with them? ____________________________________
____

Do you struggle with expressing your value to your current clients?_________________________________
____

Are you confident in your discovery calls that you ARE the solution to the problem(s) they present?
____
____

Do you have a niche that you know well? ____
____

Are you already trained with a specialty that you want to be able to focus on? ____________________
____

How different would your life be if you only worked with your ideal clients, they paid you well for what you provided, your team did all the compliance work, and everything ran smoothly? _________
____
____

Create your Intake System:

Copy for email #1 (link to intake form):

____
____
____
____
____
____

Questions for your intake form:

Copy for email #2 (link to schedule for qualified leads):

What could you offer in your email to those who are not a fit?

Copy for email #3 (courtesy for non-ideal clients):

-ACTION ITEM-

When you see our Session 2 Homework thread in the group, comment with the questions you've decided to ask on your intake form. Posting means you're entered to win tomorrow's giveaway!

Additional Notes:

Session 3

Pillar 2: Systemize Your Ecosystem (Part 1)

2 KEY RECAPS FROM SESSION 2:

1. ____
2. ____

The ecosystem of your firm must be completely ____________________ from the very first point of ____________________ to the ______________point.

The work we did in session 2 was the ______________ point of your _____________. You created your first _________________________to handle inquiries that pre-qualifies _______________________that did not consume any of your __________.

Today we'll look at the next 3 processes to systemize so there are no gaps in the flow:

1. ____
2. ____
3. ____

#1 ________________________ CALL & ____________________________ ENGAGEMENT

During the ___________________, having already read their ______________form, you have 3 goals:

1. ____
2. ____
3. ____

If the above 3 goals are met and successful, the natural progression is what are the ______________ ____?

The very next step is a ____________________________of their_______________. This will allow you to investigate and determine several things:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____

#2 REVIEW TO ___________________________ , REVIEW TO ________________________________

Once the ____________________ process is complete, you will either propose a ________________ or an ongoing ________________________.

If a ________________________ is required, create a ___________________ specifically to resolve the ________________ found in the _______________. Be very clear on the ________________ included in the renovation.

The proposal for the ongoing ____________ is as of the ____________________________date. Not when you ________________it. It's the date you set in the renovation _______________.

It is important to separate these two items because
a) ____ and
b) ____.

Once the proposal for an ongoing _____________ is signed back, you will confidently bring the client in to your ________________.

#3 ON-BOARDING NEW CLIENTS THE EASY WAY

On-boarding a new client needs to happen with entire inclusivity, and systematically so that it's ______________________, ______________________ and _____________________________.
This means creating a _________________to follow each and every time.

Inclusive & Systematic:

Document everything you would need from the ____________ from the beginning. This eliminates the ___________ & ____________ as well as _____________. Think about everything you would need to have ____________ to, _______________ required, and which _______________need to be set up.

Items to consider:

1. ____
2. ____
3. ____
4. ____
5. ____
6. ____
7. ____
8. ____
9. ____
10. ____

Create a ______________________ of these items to send to the client along with relevant ________________ or ________________ and a way to _____________ the __________________ process.

On Your Own:

Which questions will you ask during your discovery calls to identify your lead's pain points?

____

____

How will you explain why a review is necessary?

____

____

If, during discovery, you determine the client is NOT a fit, how will you handle it?

____

____

Create a checklist for your review process (what are you looking for?):

Create a checklist for your on-boarding process (what do you need?):

-ACTION ITEM-

When you see our Session 3 Homework thread in the group, comment with your explanation of why a review is so important prior to presenting a proposal. Posting means you're entered to win tomorrow's giveaway!

Additional Notes:

Session 4

Pillar 2: Systemize Your Ecosystem (Part 2)

2 KEY RECAPS FROM SESSION 3:

1. ____
2. ____

Once the client has been _________________, fulfilling your _______________ and providing your __________________ needs to be executed _________________.

This means creating a step-by-step ________________for everything you do.

Creating this ________________ ensures that everything gets done exactly the ____________________ each __________, regardless of who does the __________.

The way eliminate your ______________________ is to ____________________ it so that _____________________can do it.

__________________ **THE** ______________________________**:**

______________ the ____________________ starts with identifying the _____________ ______________ you go through for each deliverable.

Once you have documented each ________________, create a ______________ capturing each step.

It is very important you DO NOT document these steps as if _________ were _______________________. This tends to contain _______________________ and can cause ____________ of best practices because it's _____________ for you.

Include in each step each __________________ you would need to have ______________ to support what's been ________________. Think about what you would need if someone forgot to ________________________________ and changes were made. Think about __________________.

It is important to also create a ______________ and __________________ convention for each supporting _______________ or _________________ that is part of that process.

_____________ and ___________________ consistency is crucial for locating ____________ or _____________________. Knowing where to find them easily saves _____________ and ________________________.

Core Compliance Checklists to Consider:

1. ____
2. ____
3. ____
4. ____
5. ____

Each checklist should be created in a ______________ format and then _______________ for each __________________. You will use these checklists to _________________ the work to your ____________________.

ON YOUR OWN:

Consider the following:

1) How can I ensure my checklists meet best practices?

____

____

____

2) Which processes do I need to map out and create checklists for?

____

____

____

3) Which reports do I need to save for each of these checklists?

-ACTION ITEM-

When you see our Session 4 Homework thread in the group, comment with why it is so important to have a naming and saving convention that is consistent. Posting means you're entered to win tomorrow's giveaway!

Additional Notes:

Session 5

Pillar 3: Leverage Workflow To Get Compliance Work Off Your Plate!

3 KEY RECAPS FROM SESSION 4:

1. ______________________________
2. ______________________________
3. ______________________________

The magic happens when we put it all into a ____________________. Each _________________ becomes part of a ____________________. This is how we are able to _________________, monitor, manage and _______________.

LEVERAGING WORKFLOW

Workflow software is your virtual _____________________________ on-screen. When set up correctly, you'll be able to know the _______________ of each client at a glance.

It will tell you:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________

Each one of these __________________ is set up as a ____________________ so you can _______________ them to clients and, when applicable, have them ________________.

From the time the client has accepted your ______________, you bring them into your _____________________ using these ________________________.

________________________ one ____________________ at a time, for one _____________ at a time, one _______________________ at a time!

Eventually you will have all of the ______________________ delegated, leaving your _________________________ open for __________________work.

ON YOUR OWN:

My workflows will contain the following processes:

____

____

____

If I set up my processes as checklists and am able to delegate all or parts of the work, this would give me time to:

____

____

____

To facilitate efficiency, reference to my systems training will be included in my workflow for each process as (hyperlinks, folders, attachments, detail within):

____

____

____

-ACTION ITEM-

When you see our Session 5 Homework thread in the group, comment with why it is so important to have a naming and saving convention that is consistent. Posting means you're entered to win Monday's giveaway!

Bonus Session

Bonus Session: Time Blocking

3 KEY RECAPS FROM SESSION 5 (what do you remember?):

1. ____
2. ____
3. ____

Time-blocking is a method of deliberately creating ________________ to ___________________ your _________________.

Creating space for what you ___________ to do and ______________, ensures you will_______________________________________.

Start by listing out all of the tasks that occur in your days:

____

____

Use colour-coding and/or ________________ to distinguish between ________________ & personal items.

Start by adding all existing and ______________________appointments/meetings.

Then go through your list and start blocking ______________ on a __________________basis on your calendar for each of those items.

Assign the amount of _____________ you want to spend on each task. Do not ___________________every open gap of _____________.

________ blocks show you where you have _______________for something else.

Bonus Session: Determining The Right Software

NOTES:

Session 6

Pillar 4: Reposition Yourself As An Expert & Use Your Firm As A Tool

KEY RECAPS SO FAR:

NOTES:

BONUS SESSION:

Support & Accountability, Eliminate Backslide,Obstacles & Resistance

NOTES: