GOAL ACHIEVEMENT

The ready-set approach to success

A winning approach you can start using today

Goal Achievement is a holistic, client-centered approach that helps you succeed by design, not by chance. It puts systems around the art of engaging in dialogues that bring clarity to your clients' life situations. When you let your clients' vision guide the process, you naturally develop deeper relationships, implement more effective solutions, and close more sales. Best of all, Goal Achievement offers customizable tools and software to create professional deliverables that illustrate your clients' goals, outline action steps and establish your value. Starting today you can:

- Engage more clients
- Understand driving motivators
- Clarify top visions and goals
- Identify resources and obstacles
- Motivate confident decisions
- Increase your business profits

Ready Goal Achievement is not intended to change the way you do business; rather it's designed to enhance your results. As an advisor, it's your job to uncover your clients' vision and discover what really motivates them. Goal Achievement provides you with the framework to carry such powerful conversations. The objective is to move beyond what your clients own and inspire them to talk openly about their vision and goals for the future. With that vision in mind, and by framing your questions in just the right way, you can begin to develop a deeper relationship and allow them to explore their motivations for their planning and lead them straight to their own "aha" moment.

Set Goal Achievement is a proven approach you can easily integrate into your existing practice. It's effective because it keeps you focused on what your clients value, not just on what they own. By following the model and supporting your work with the Wealth Optimization software, you can clarify and prioritize your clients' goals, identify obstacles, make strategic recommendations and, most importantly, close more sales.

Success You know it, that electrifying moment when your clients' mindsets shift, when the energy in the room changes and you feel your connection taking root. They're on your side. Or you're on theirs. Either way, you're on the same side of the table. You've achieved what every advisor strives for – the moment they're ready to move forward and trust you to get them there.

Achieve your clients' goals and exceed your own

When you hit that mark, when your clients suddenly realize that your strategy is perfectly aligned with their personal vision and goals, they become highly motivated to take action and trust that your recommendations will get the job done. Goal Achievement is a system that you can easily replicate with every client, regardless of their net worth. Following this framework, you will be able to build a trusting relationship, accomplish your clients' goals and track their progress over the long term.

Remember one simple acronym: VISOR

To help you follow the system, we've created an easy-to-remember acronym: VISOR. It's a simple way to shape your conversations around Vision, Importance, Supporting Resources, Obstacles and Readiness. The VISOR conversation provides the structure to ask the right questions and get to the right solution, right away.

Vision: Ask the right questions to inspire your clients to share and prioritize their goals and clarify their visions in a way that earns you their trust and confidence.

Importance: Gain clarity around why each goal is important and identify the driving motivators.

Supporting resources: ~~Resources~~ Identify the resources that are available to achieve their goals and help you deliver the most effective and well-informed solutions.

Obstacles: Identify the obstacles that may impede progress or prevent them from accomplishing their goals.

Readiness: Use the readiness scale to determine how ready they are to take action on what matters most to them and those they want to impact.

Advisors, take your mark

Goal Achievement is the ready-set approach to success that will change the way you do business.

The Legacy Companies have long led the cutting edge of innovation and discovery-based advising. To learn more about our concepts, strategies and training programs that can help you, please call us at888.649.4591 or visit us at www.legacyboston.com.

Questions?
Talk to us today.

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Optimizing How Advisors Attract, Engage & Retain