




An Introduction to Pareto Systems



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paretosystems
Consistent. Results.

About Pareto Systems

Pareto Systems is an industry-leading business development firm dedicated to the elite professionals and companies within the knowledge-for-profit sector. Duncan MacPherson and his team of consultants work with professionals in a wide range of fields including Financial Services, Insurance, Accounting, Legal, Mortgage, and Consulting to create predictable, sustainable, and duplicable businesses. Pareto Systems is well known for its approach which is based on best practices and for its focus on implementation.

Pareto Systems positions professionals to:

- Uncover new assets/revenue
- Build and competitor-proof fiercely loyal advocates
- Establish a steady stream of qualified referrals
- Run more efficient and profitable practices
- Restore liberation and order to their personal lives



About Duncan MacPherson



As CEO of Pareto Systems, Duncan travels extensively throughout North America and around the world, conveying dynamic and fact-rich presentations that have made him a popular spokesperson for the knowledge-for-profit sector.

Duncan's expertise in demystifying business development and marketing in the financial world has universal appeal; from the high-level advisor to the successful wholesaler, to corporate financial institutions. Duncan's primary goal is to help Knowledge-for-Profit Professionals achieve liberation and order in their businesses through step-by-step methodology and execution.

Duncan often contributes articles and commentary to industry publications and is a best-selling author with his book: *Breakthrough Business Development, Take Your Business to the Next Level*. Recently, he has released his new book: *The Advisor Playbook*.

Duncan enjoys many recreational activities including golf and tennis, and he loves spending time with his wife and two boys.



Our coaching philosophy and approach are grounded in the following top five focus areas:

The 80/20 Rule (Pareto Principle) - If eighty percent of your business stems from twenty percent of your clients, it is essential that you continually invest eighty percent of your time on that twenty percent. It's common sense, but not often a common practice. Many advisors unknowingly spend eighty percent of their time on the eighty percent of their clients who generate just twenty percent of the business. As a result, the eighty percent of the clients get over-serviced at the expense of the twenty percent. And they typically refer people pretty much like themselves.

Professional Branding - As a knowledge for profit professional it is essential to take the abstract and commoditized nature of your value and make it proprietary. This will enable you to competitor-proof your clients and create more consistent advocacy.

Stewardship over Salesmanship – Because of the commoditization of the industry and the velocity of competitive factors, you do not want to be perceived as a salesperson fixated on Products, Pricing, and Performance; you want to have your clients buy-in to and appreciate you as a consultant that focuses on a Philosophy, Planning Strategy, and Process.

The Loyalty Ladder – Conversion from Customer to Client to Advocate: Customers place only some of their business with you. Clients work exclusively with you and empower you fully. An Advocate is the dream client, fiercely loyal, empowers you fully, and promotes your services to your family, friends and associates.

The Power of Process – Having a consistent, congruent process for onboarding new clients and re-framing your relationship with existing clients ensures you are positioned as your client's personal CFO, where they understand the full array of services and solutions that you provide. Ultimately, so that they come to you for all their financial decisions and solutions.



Advisors best suited for Pareto Systems:

- An advisor who is already doing well but may have hit a plateau and wants to take their business to the next level
- Advisor's goal is to have, ideally, 75-150 ideal clients
- The advisor buys-in to an approach based on a Philosophy, Planning Strategy, and Process

REFINE YOUR BRANDING & COMMUNICATION

Be perceived as a consultant with a process, not as a salesperson with a quota. It's not what you say, it's what they hear that matters

- Determine your branding and value proposition statement
- Gain clarity on why a client wants to work with you, and how they can compellingly communicate that to others

FAST-TRACK NEW CLIENTS TO ADVOCACY

Refine, develop & deliver a process to onboard new clients. Ensure consistency for every client and bring them quickly to Advocate status

- Create predictability for the advisor and client
- Create high levels of trust and rapport with a new client that will last
- Differentiate yourself through your onboarding process and your actions



MAXIMIZE EXISTING CLIENT RELATIONSHIPS

Ensure that all of your existing clients are working with you in the true spirit of partnership and understand all your services going forward

- Reframe your value to ensure your clients focus on your worth, not your cost
- Competitor-proof and make it easy for clients to refer your process, planning strategy and philosophy
- Position yourself as their CFO in all situations going forward

PROFESSIONALIZE YOUR BUSINESS

Create organization and clarity in the operation of your business and initiate high levels of quality control through process development

- Effectively and efficiently delegate/communicate tasks and activities within your team
- Review and document every aspect of your financial planning practice
- Create a procedures manual so your business runs on process, not personality

ORGANIZE YOUR CLIENTS

Create a Client Classification framework based on assets, attitude and advocacy that will sort and organize your clients in a meaningful way

- Define clear criteria for desired assets, attitude and advocacy of an Ideal Client
- Establish clear criteria for classifying clients on the basis of assets, attitude and advocacy
- Establish clear criteria for accepting or rejecting a potential client on the basis of assets and attitude

ELEVATE THE CLIENT EXPERIENCE

Ensure you deliver ongoing client service with the highest degree of consistency and predictability to build trust and satisfaction

- Improve client loyalty and build higher levels of trust with your best clients
- Implement a fixed service program for each Client Classification group
- Use time, energy and money resources efficiently in your Advocate Service delivery
- Create procedures for each service activity to ensure consistent and flawless delivery