Virtual Practice Management Academy Recap

This past week we hosted our first-ever Virtual Practice Management Academy and everything went very smoothly. This is why we'd like to share with you a recap of all that was covered under each presentation with video links for the individual presentations. This way you can jump to the sections that matter to you and your position versus having to search through 8 hours of content.

See below our agenda and our corresponding video links. This is also housed under our school website under Events > PMA Videos. Here is the direct link for your convenience: https://advisorsacademyschool.com/pma-videos/

DAY 1

Job Duties & Roles

In this section, we review the four major job roles that we see within financial offices, what each individual job duties are involved, the best method to growing your roles within your company, and positions for the agency model.

Click here to Watch the Video

Practice Management Tools

In this section, we review some of the most common practice management mistakes and some different tools to increase communication and direction and have an overall happier and healthier work environment for advisors and their staff.

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CRM Best Practices

In this section, we review Redtail, general CRM questions, best practices, tools to utilize, ways to import and clean up data, and areas that offices should be paying attention to when it comes to utilizing a CRM.

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Marketing

We are always looking for the best lead-generating tools and what marketing programs have the greatest ROI. In this section, we review a few different marketing tools and the best practices for creating a successful event.

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Firelight & Annuity Applications

Richard Rawls, our New Business Processing Coach, did a deep dive into Firelight, including how to set up new applications, tips on avoiding NIGOs, how to pull companies into transfer forms, and much more.

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Overcoming Objections

One of the hardest parts of being an appointment setter is having to deal with objections. But with our scripts and direction, you can easily push past them and get appointments scheduled. Listen to this section where we jump into some basic call tips and scripts.

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Sound Income Strategies

Keely Escalante and Cassandra Martinez reviewed the SIS paperwork you would be handing to your team when transferring new funds into accounts. They reviewed some common NIGOs they see and some resources you can use to get the answers you need.

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DAY 2

Metrics

In this section, Andrew and Abby review our metrics system and why it's so important to track your business. Andrew does a deep overview of the dashboard, marketing, and new business sections of the metrics system, as well as highlighting some of the new features we have.

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Tech Stack

Ever get overwhelmed by all the technology you are using for your firm? In this section, Abby reviews the upcoming technology in the financial world, what is worth implementing, and some tips on how to audit your existing and potential new technology.

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Email/iContact

In this section, Abby reviews one of the most important and underutilized marketing tools out there. She discusses some basics of iContact as well as the top tips for having a successful email marketing plan.

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Chat GPT

Richard Hanna from our marketing team jumped in and did a quick segment on the benefits of ChatGPT, how to use the software, and tips on improving your responses. If you're not utilizing AI software yet, then you should watch this video.

Click Here to Watch the Video

Client Services

Aggie Valenta and Jacob Betteridge from Scranton Financial Group jumped in to give us some insight into the Client Service Advisor role by discussing how they conduct their quarterly calls, prepare for client reviews, utilize the 8-step client review process, and ask for referrals.

Click Here to Watch the Video

If you'd like a deeper dive into any of these topics, please don't hesitate to reach out to our coaching coordinator, Daniela Araujo, to schedule a call at (954) 870-6717 or daraujo@advisorsacademy.com.

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