

The 10x Conversation

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Founder, CEO & Advisor

LAN Practice Enhancement Meeting

March 16, 2023



Financial Designs by the Numbers

90

46

3

Objectives

Today's presentation is designed to help you:



Position yourself for successful engagements



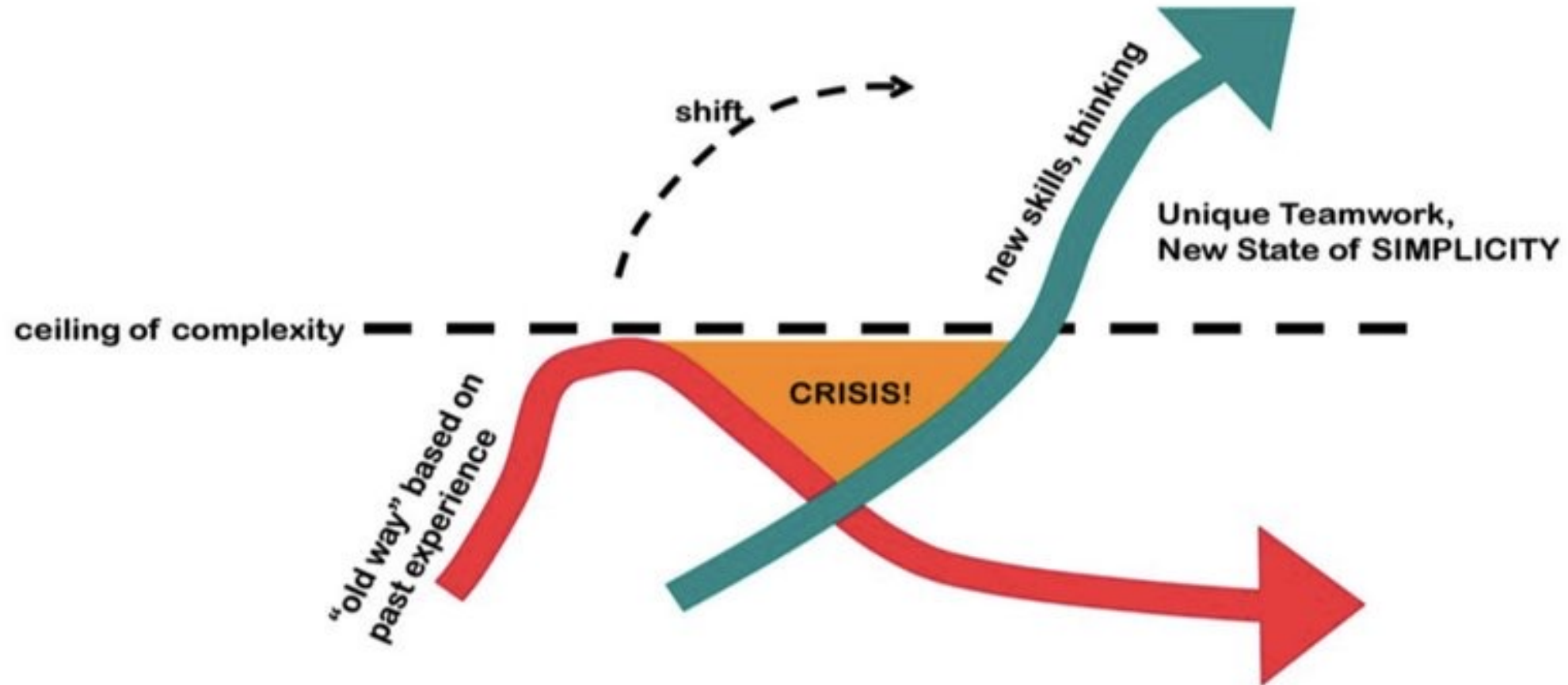
Drive greater and more immediate impact



Build a business



Ceiling of Complexity



The Power to Connect

Who they are

What the conversation /
consulting relationship
is about

How you want
them to feel

What you want them
to do in the meeting

THE POWER TO CONNECT™ WORKSHEET			
DATE: 3/15/23			
THEM		APPRECIATE	
1	Business Owners	1	Their Hard Work
2	College Educated	2	Their Success
3	No Advisor	3	Their Trust to Meet
REMEMBER		OBSTACLES	
1	Their Company	1	Time
2	Their Money	2	Complexity
3	Their Future	3	CPA Firm
FEEL		VALUE	
1	Relaxed	1	Experience
2	Engaged	2	Go Givers
3	Excited	3	Commitment
DO		YOU	
1	Ask ?s	1	Present
2	Listen	2	Listening
3	Say Yes	3	Authentic

What you appreciate
about them

What challenges need
to be overcome

What you value

How you will be
during the meeting

The 10x Conversation

TODAY

IN 10 YEARS

- | | |
|-------------------|-----|
| 1. Revenue | 10x |
| 2. Profit | 10x |
| 3. Business Value | 10x |

Client _____



30% of people – don't spend your time

60% of people – work to get them to green

10% of people



Do You Want to Fix It? Yes / No

Client Questions: Initial Engagement

Q. Present: **Where are you now?**

Q. Future: **Where would you like to be?**

Q. **What challenges do you face?**

Q. Attempts: **What have you tried?**

Q. Impact: **What if you don't do anything?**

Q. If we meet three years from today and we look back over those three years, what has to have happened for you to feel happy about your progress, both personally and professionally?

Q. Are you committed to achieving this vision?

12 Box Thinking

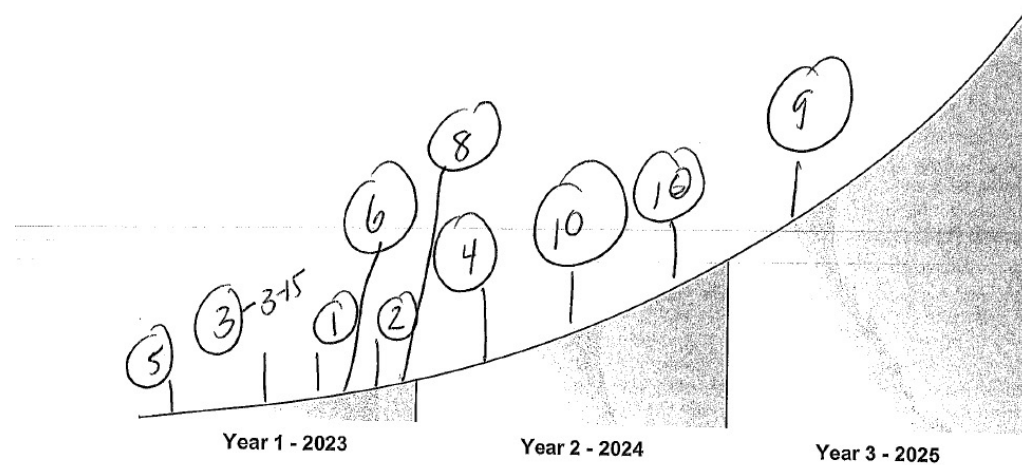


Dangers | Opportunities | Strengths

The D.O.S. Worksheet	
Name	Date:
D Three biggest dangers to be eliminated.	1 No Buy-Sell
	2 Inadequate Ins
	3 No Plan
O Three biggest opportunities to be focused on and captured.	1 Buy-Sell
	2 Upgrade
	3 Hire FD
S Three biggest strengths to be reinforced and maximized.	1 Reputation
	2 Employees
	3 Cash

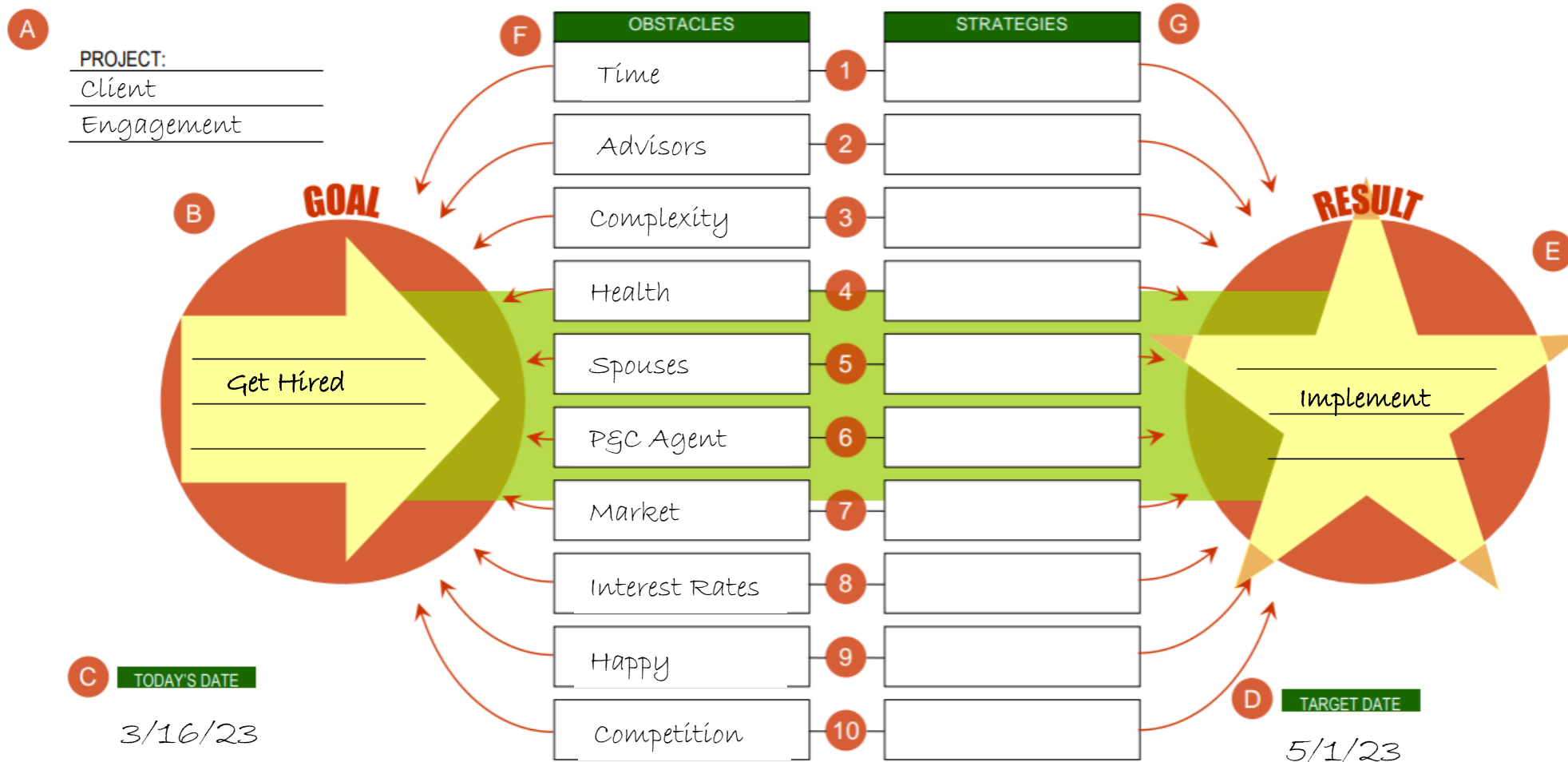
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The Next 3 Years



1	Execute Buy sell
2	Upgrade Life Insurance
3	Make S election
4	Distribute REA - TBD
5	Get Examined
6	Review - W-2 pay
7	Look at HSA - Health
8	Hold Advancement meeting
9	Buy competitor
10	401-K

The Strategy Circle™



All those things that seem to oppose our goals are actually the raw material for achieving them.

The Strategy Circle™ Accountability Chart

	Strategy	Who's Involved	Deadline	Milestone 1	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6	Milestone 7	Milestone 8
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											

Debriefing & Learning

In today's rapidly changing world, your team's ability to learn faster than the competition is a competitive advantage.

What Is a Debriefing?

A professional discussion around the team's key activities that enables each person on the team to discover for themselves what happened, why it happened and how to improve

Key Point

Effective debriefings build—not tear down—teams.

What to Look for in a Debriefing

Increased accountability, productivity and playbook execution

Structure to Follow

Desired Outcome

Secure Engagement

Actual Outcome

Client said Yes

Cause

Wants to Solve Enterprise Value

Lessons Learned

Slow Down; Be Prepared

Changes to Document & Implement

Power to Connect

Questions / Discussion

