



SAN – Pod Concept

Backdrop

- Commoditisation in professional services
- Career boredom of '20 year-in' professionals
- Emergence of "Sense Maker"
- People looking for next chapter or body of work
- Largest ever transfer of intergenerational wealth occurring
- Succession opportunities enormous

Problem we're solving

- 1 Successful individuals and successful families don't have a family plan. They don't know where they are going
- 2 They don't have capability in agile advisers to support that journey
- 3 Advisers need a process to articulate and demonstrate the value that they can help the clients on this journey

Learning Outcomes

- 1 A framework to help families articulate their desired future
- 2 How to demonstrate your capability to support that journey
- 3 Additional adviser skills in personal, business & client mastery to broaden your skills sets from your existing swim lanes
- 4 Client collateral to demonstrate concepts and run a 12 month client agenda

Pods

Pods consist of 10-15 advisers from wealth, tax, legal & independent directors etc. Mainly they are professionals 10-20 years into their career.

They are current partners in Accounting, Legal and Wealth firms; who are career bored, looking for their next chapter of work.

Coach the Coach

Understand models & Frameworks

Core Models

1. Demonstrate, explain and role play facilitator
2. Content/ Context – Red, Blue, Black & Green
3. PIES Model – discussion and demonstration
4. Functionality – Collateral/demonstration/stories/examples
5. Ideal Week – when, why, how
6. Positioning
7. Wheel of Life – when, why, how
8. 10-3-NOW models, 100 year plans
9. 3 year – 1 year – 90 days rocks
10. SCARF model
11. Solving and understanding the problem
 - Be able to demonstrate and discuss the issues
 - Significant Individuals to family boards
12. Bringing the theory to life – families
 - Direction, setting context
 - Demonstrating capabilities
13. Types of boards, advisory, sounding, business, family, professional best friend
14. Pricing of services, demonstration, casting a shadow
15. Able to articulate the value proposition of the SAN course
16. Able to run a SAN Pod, help with core competencies
17. Use and explain/demonstrate collateral
18. Run 2 clients through the process (credibility)
19. Understand succession planning and collateral
20. Be able to coach and advise when necessary



Sample Time Commitment – Running a SAN Pod

1. 2-day course	Plus - 1.5 hours monthly connection direction and training plus co-ordination of the event
2. Foster connections within the group eg: introductions to legal, wealth, accounting, business coaches and bankers. Increasing workflow within the group.	1.5 hours per week
3. Pricing, presentation and packaging helping the advisors with their existing and new clients.	1 hour per week
4. Training and presentation skills. Allow 1 SAN member per week to help refine their presentation and engagement skills.	1.5 hours per week
5. Looking for opportunities for the group, whether it is with CFO Centre, banking, business coaches etc.	1 hour per week
6. Developing the SAN members' wheel of competency and their 12-month personal plan.	Allow 1 hour per week ie 1 SAN member per week
7. Building your Pod. Adding new members to your Pod with calls for follow up meetings	Allow 3 hours per week
8. Accreditation and further education	Allow 12 hours plus per week in total for SAN time commitment for running a Pod
So it's circa 1 – 2 days per week initially to run a Pod. That will include additional training from myself around coach to coach and mentoring.	



Ideal Coach/ “SAN Chair”

Must be competent in:

1. The engagement and explanation
2. The:
 - (i) financial models
 - (ii) business models
 - (iii) client models and engagement processes
 - (iv) personal mastery in IQ and EQ
3. The collateral provided in SAN
4. Answering queries from SAN Members
5. Pricing and explanation of fees
6. The reasoning behind the models
7. The ability to find new SAN Members. It is assumed that members will come and go over a period of time.
8. Must be able to run a Pod and have a high level of communication skills.
9. Must be able to add value to the SAN program plus the individual Pod through contribution of IP and the skill sets that you have.
10. Must not muck with the hamburger, must be coachable

Why Be a SAN Chair

- Enhancing your business referrals and relationships
- Essentially being paid to build distribution
- May compliment your existing client base
- The collateral and systems have already been built, tried and tested
- Regular, monthly revenue streams
- Best use/leverage of your wisdom
- Part of a collective network V's working by yourself
- Next chapter; next body of work

Our expectations of you...

- Respect the IP & licence agreement
- Promote SAN and it's members
- Act with integrity
- Attend Coach the Coach program
- Be very clear in communicating your role in SAN Vs other work you may do
- Contribute to the group
- Communicate early any issues you're experiencing

Your expectations of us...

- Provide collateral, ongoing training & support
- Respond promptly to queries and issues
- Be promoted throughout the group
- Act with integrity

Financial Model

SAN Program:

Initial 2-day workshop

Ongoing monthly membership

2-day workshop

Cost to participants: \$2,000 + GST

Facilitator (you) remuneration: Share of the profits after costs

Costs include: Flights & accommodation for presenters, venue hire and catering, printing & stationery, ad hoc charges related to running of workshop

Our services	<ul style="list-style-type: none"> • Provide you with a Licence Agreement • Liaise with attendees (contact provided by you) regarding registration and course attendance • Bill issue and collection • Venue hire & organisation, if required. • Provision of Course booklet and stationery required eg: flip charts, markers etc • Travel arrangement for presenters • Manage new member website and online course access • Provide you with the opportunity to attend the annual conference on the Gold Coast
Facilitator responsibilities	<ul style="list-style-type: none"> • Sourcing attendees • Provision of attendee details to SAN admin team within agreed timeframe

Example: 15 members

Initial Workshop \$30,000 less 10k in costs, 10k each from profit

Annual Revenue \$300,000 less 20k licence fee, less 30% = \$196,000

Monthly Membership – Year 1

Licence fee: \$20,000 + gst per annum, paid monthly via direct debit + 25% of total participant fees

Licence inclusions	
Our services	<p>Administration</p> <ul style="list-style-type: none">• Provide you with a Licence Agreement• Organisation of 2nd workshop – midway through year 1 (see workshop services above)• Co-ordination of monthly webinars ie provision of collateral, manage member invites• Ongoing management of website including document library and webinar recordings• Bill collection• Account reconciliation• New collateral development <p>Coaching</p> <ul style="list-style-type: none">• Sales (on provision of sales leads from you)• Liaise with SAN members re pitching, pricing, presenting to new clients• Coach the Coach (one on one with Scott and Paul Crane)
Facilitator responsibilities	<ul style="list-style-type: none">• Host monthly webinars (collateral and monthly program provided)

Monthly Membership – Year 2

Licence fee: \$20,000 + gst per annum, paid monthly via direct debit

PLUS

PLAN A: 30% of total participant fees OR

PLAN B: 20% of total participant fees

Plan A	
Our services	<p>Administration</p> <ul style="list-style-type: none"> • Provide you with a Licence Agreement • Organisation of 2nd workshop – midway through year 1 (see workshop services above) • Co-ordination of monthly webinars ie provision of collateral, manage member invites • Ongoing management of website including document library and webinar recordings • Bill collection • Account reconciliation • New collateral development • Provide you with the opportunity to attend the annual conference on the Gold Coast <p>Coaching</p> <ul style="list-style-type: none"> • Sales support (liaise with you and SAN members where appropriate re pitching and pricing) • Liaise with SAN members re pitching, pricing, presenting to new clients • Coach the Coach (one on one with Scott Fitzpatrick)
Facilitator responsibilities	<ul style="list-style-type: none"> • Co-host monthly webinars (collateral and monthly program provided)

Plan B	
Our services	Administration <ul style="list-style-type: none">• Provide you with a Licence Agreement• Ongoing management of website including document library and webinar recordings• Provision of monthly webinar program and collateral• Bill collection• Account reconciliation• New collateral development• Provide you with the opportunity to attend the annual conference on the Gold Coast
Facilitator responsibilities	Administration <ul style="list-style-type: none">• Organisation and facilitation of workshops (see workshop services above)• Co-ordination of monthly webinars ie manage member invites• Provision of webinar recordings to SAN admin team for uploading to website Coaching <ul style="list-style-type: none">• Sales (on provision of sales leads from you)• Liaise with SAN members re pitching, pricing, presenting to new clients• Host monthly webinars (collateral and monthly program provided)