

ASKTRA Rollout

“First impressions are everything,” and a ASKTRA launch is no exception. A successful rollout to the team sets the stage for future firm growth.

Ideas

Your ASKTRA launch strategy should include planning, communication, expectations, and goals.

- a. Planning: Create and update an actionable idea plan that includes; activity description, who owns it, target dates, actual dates, etc.
- b. Communication: This is the official unveiling. Partners should explain the commitment and rationale for this new referral process. Sharing a “Strategic Growth” statement should be included. Here is an example:

“Did you know that almost all our new clients come from referrals and introductions? They are an impactful and necessary part of our strategic growth plan. By stepping up our ability to grow the firm we’ll better serve you and our clients.”

Share the ASKTRA URL, password and welcome video link during this communication.

- c. Expectations: Help the team understand the bigger picture to gain their buy-in. Describe to them what success looks like; for the firm and advisor. Then clearly share start dates, communication methods (email, Slack, etc.), and scheduling in-person discussions,
- d. Goals: They should be obtainable and part of the firm’s strategic plan. Make sure that the team is fully aware of the goals. Also regularly measure results versus targeted goals. Make those metrics available to the team.
- e. Bonus: Add ASKTRA and metrics results updates to partner and staff meeting agendas.

Idea Sheets provide quick and actionable suggestions to drive more referrals and sales. Visit www.referralsafe.com/asktra frequently for new additions.