Mastership for Advisors

Boost your client skills.
Grow your business.

MASTERSHIP

Why Mastership?

Invest In Your Success

Long-term clients are the life-blood of your business. Your ability to grow and sustain client relationships is critical for a thriving business.

The skills you need to be a trusted advisor are not taught in university. But the good news is: the skills can be learned. Enter Mastership for Advisors.

Mastership for Advisors is a practice tailor-made for advisors in financial services. But it's more than that. It's a manual for cultivating better relationships. A training program in trust.

Advisors are employed to provide insight into the complex world of finance. Now there's a way to gain relevant insight into the complex world of your clients. Mastership was born from decades of experience in sales and account management. It incorporates techniques from social psychology, story, mindfulness, as well as sales and consulting best practice. The result? An innovative approach to client engagements.

The practice helps you improve your client skills and become a better communicator. It isn't about smooth-talking your way to success. In fact, it's pretty simple: listen to your client, learn their story, earn their trust and help them realise their goals. That's how you grow a successful relationship, and your business.

"Mastership is about learning the process of 'story-telling' and understanding a client's true story to lead to a much deeper client relationship. This fosters a more loyal client, and enables the advisor to better provide advice that's in the client's best interests."

Patrick Anwandter

Director

Strategy First Financial Planning

MASTERSHIP

Program Outline

The program consists of a two-day workshop with Anthony Joseph (the Mastership expert) followed by coaching to support you to apply the practice to your work.

The Interactive Workshop:

The workshop is a chance for Anthony to come in and teach your team face to face. It's built around a typical client case study with people using it to create and present a solution. Your team learns new approaches to client acquisition and growing trusted relationships. It's hands-on, engaging and only takes two days.

Customised Coaching:

People learn best by doing. Coaching straight after a workshop helps you and your team turn knowledge into action. You set the agenda and we support you, whatever you need.

TAKEAWAYS

You'll leave a Mastership Program with elevated skills to convert more prospects and improve every client interaction.

- How to position yourself as a trusted advisor to cultivate strong relationships with your prospects and clients.
- The Four Bucket approach to discovery for prospect and client conversations to help you quickly understand your client's drivers.
- The 7 Co-creation Steps to fit your solution or advice to deliver business value to your prospect or client.
- How to harness the power of story to pitch your advice in a way that's compelling and motivates your client to act.
- The Mastership Canvas, a tool to capture your client insights so your solutions and advice hit the mark.

Strategy First Financial Planning, an independently owned financial planning firm, sought out Anthony Joseph to develop the client skills of its people, a mix of experienced and new Financial Planners.

Continuous improvement is part of Strategy First's DNA. Client skills are critical to its long-term growth strategy. Strong client relationships are a win-win. Clients get the best financial outcome. And Strategy First grows through new client referrals.

Ambitious and innovative, Strategy First recognised investing in the client skills of its people would pay dividends for years to come.

Strategy First wanted to fast-track the process of teaching its new planners higher level communication skills and to elevate the client skills of its more experienced team members.

The Mastership workshop established a new approach. Flexible, fitting their existing process and designed to enhance Strategy First's ability to grow relationships built on trust.

Follow up coaching supported the team to apply Mastership to their daily work with new and existing clients. Adopting the Mastership tools has enhanced how the team capture and share their clients' stories in a way that also meets best interest obligations.

A YEAR ON: Strategy First have strengthened their place as industry leaders. This status has been recognised twice; with Patrick Anwandter, Managing Director, named one of the Top 50 Financial Advisers of 2017, and Rhys Phillips, nominated for Financial Advisor of The Year.

> **"Mastership has helped us create better outcomes; diversified service offering, greater cooperation with accounting partners and ultimately better outcomes for our clients."**
>
> **Patrick Anwandter – Managing Director**

“There are competitors in the marketplace (Australia & US based) who are ‘coaches’ for advisors, but they are a lot less personal and are very much about following a ‘process’ or script. Whilst I see what Anthony does as changing the DNA of the advisor so they are a better listener, relationship builder and therefore advisor.”

David Price

Founder & Director

Strategy First Financial Planning

MASTERSHIP

Meet Anthony Joseph

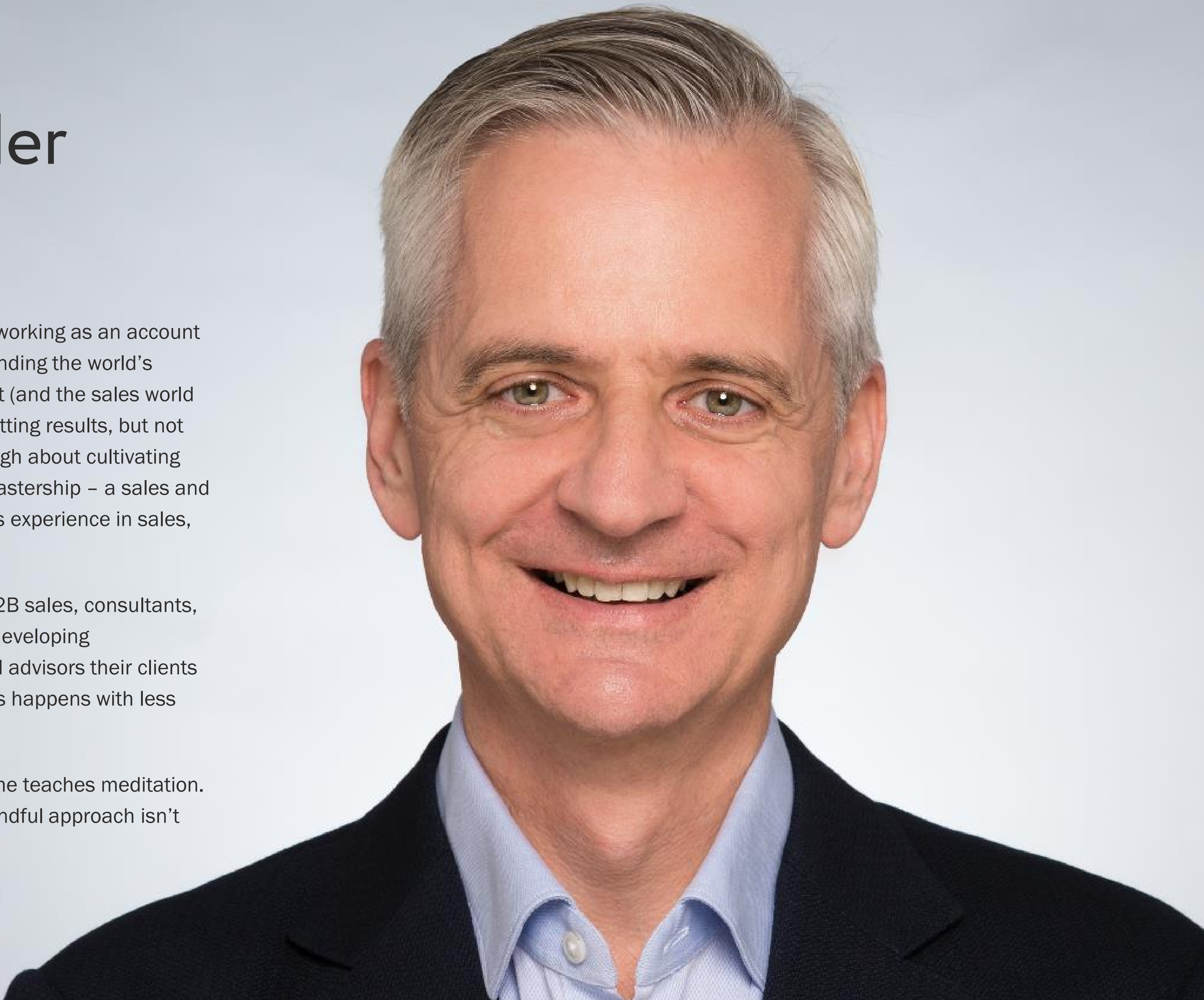
Founder and Leader of Mastership

TThe seeds of Mastership were planted while Anthony was working as an account executive and enterprise strategist for Microsoft. Despite landing the world’s biggest Windows and Office deal, Anthony thought Microsoft (and the sales world in general) was moving in the wrong direction. They were getting results, but not necessarily the right ones. And they didn't always care enough about cultivating the client relationship or understanding their story. Enter Mastership – a sales and relationship development approach that draws on Anthony's experience in sales, growth consultancy, and platform shifting.

With the Mastership program, Anthony has been helping B2B sales, consultants, and advisors in finance to be more effective at selling and developing relationships. By helping his students transform into trusted advisors their clients get more value, sales and renewals are larger, and business happens with less friction. It’s win, win.

AJ is also a Director of the Tibetan Buddhist Society, where he teaches meditation. It’s been a passion of his since he was 16. His calm and mindful approach isn’t what you’d expect from the smooth-talking sales world.

That’s probably why it works.



Is your team ready for a boost?

Start the conversation today.

Contact Anthony Joseph:

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