THE
ADVISOR
TRANSFORMATION

TOP DBDL TAKEAWAYS

1. Rather than double your production, grow a business that is half as dependent on you as it is now.

2. Relate your success to how much your stress decreases over time.

3. Leverage human capital to accomplish more in less time.

4. If you have the capital, invest it in teammates so that you can get the team and infrastructure in place that you need to scale.

5. Set clear milestones, determine what you must do to reach them, and measure your progress beyond production.

6. Create an exciting vision that your whole team and your clients can rally around.

7. Release the fear that when you delegate something to a trusted team member, it won't be done correctly.

8. Let your team become "partners" in running the business because this will encourage them to think about future challenges and opportunities.

9. Differentiate yourself by showing clients that you go beyond the basics of retirement planning and instead offer a comprehensive plan.

10. Deliver on all of your promises and pay attention to every interaction that you or your team have with your clients.

11. Do not rely on brute force for growth.

12. Understand that leadership is a learned behavior, not something that you're born with.

13. For a leader/founder to leave the office for a period of time and feel good about it, roles and responsibilities must be passed to other responsible members of the team.

14. Find a structure for identifying A+ players and helping them grow and develop.