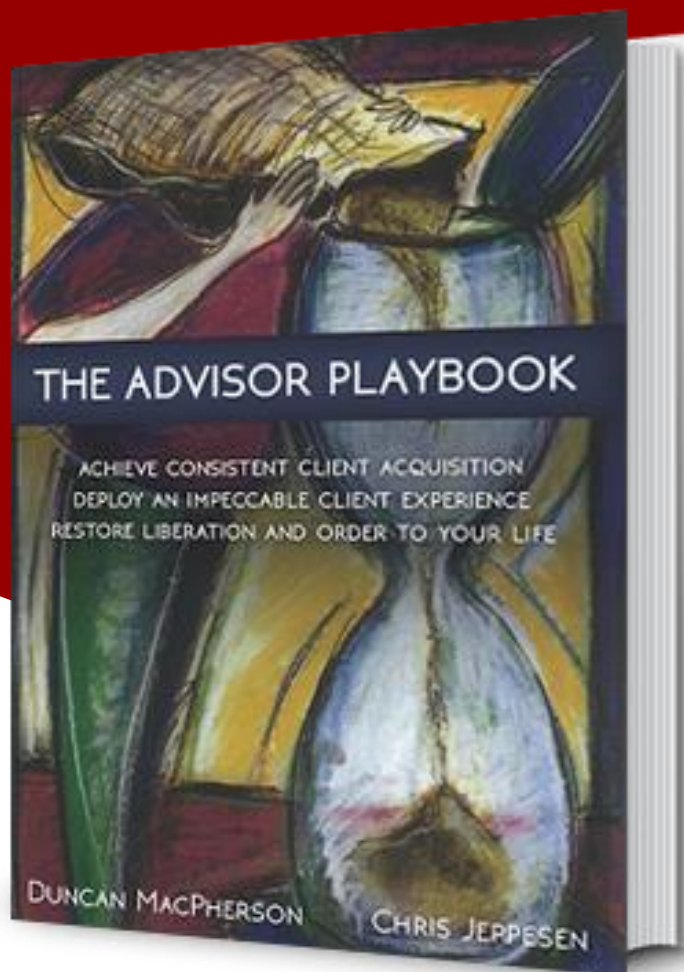


Running

THE ADVISOR PLAYBOOK

Book Club



Register your book club with Pareto and have Duncan make an appearance at one of your book club meetings. Register at:

www.paretosystems.com/book-club

Running *The Advisor Playbook* Book Club

Congratulations on taking the next step in personal and professional development. A book club is a great way to gain new perspectives, learn in an informal environment, and build a culture of continuous learning. This document is a guideline of best-practices for preparing, leading, and managing a book club for 'The Advisor Playbook' written by Duncan MacPherson and Chris Jeppesen.

Find a Leader

Even if your participants are used to being part of group discussions and are good at listening to each other, it can still be a good idea to have somebody lead the meeting. In part to make sure that everyone's voices get heard but also to come prepared with thoughts on what topics would be good to discuss, so if the conversation starts to run dry in one area, the leader can redirect to more fertile areas. You may be putting together this book club because you are a manager or leader and therefore you may be the natural fit. With that said we would implore you to pass the torch, and empower other team members for all or least some sessions.

Scheduling the Meetings

'The Advisor Playbook' has seven sections, and we recommend basing your schedule on those sections. Seven sections, seven weeks. Yes, once a week is more than enough. You don't want to overwhelm your team. We know they probably have a lot going on already. If you are running your book club during office hours, we would recommend 45 minutes to an hour. If not, 90 to 120 minutes would be reasonable.

Tips for scheduling book clubs:

- Recurring event on same day and time each week
- Send Calendar Invites for each event
- Decide on whether to host virtually or in-person
- 5 – 10 participants max



For the Participants

Read the book. This may seem obvious, but it is the most important step, so it is worth stating. It is a good idea to plan on finishing each section earlier than you might otherwise so that you have time to think about it and prepare before your book club meets.

Write down important notes or page numbers (or bookmark in your e-reader). If there are parts of the book that made an impact on you or that you think may come up in the discussion, write down the page numbers so that you can access the passages easily while preparing and leading your book club discussion.

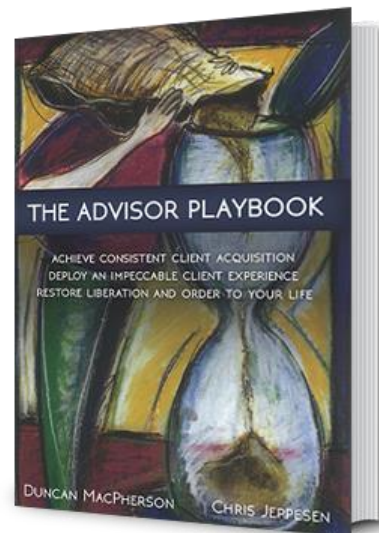
Running *The Advisor Playbook* Meeting

Book Club Meeting Agenda:

- I. **Rapport**, get situated etc. (5 minutes)
- II. **Review ground rules** (2 minutes)
 - a. Examples of potential ground rules:
 - i. Phones off
 - ii. Be respectful of others time when speaking
 - iii. Do not monopolize the time
- III. **Go around the room**, with each participant giving their opinion on the section (20 – 30 minutes)
- IV. **General Questions** - Ask some general questions that anyone can volunteer to answer. Here are some of our suggestions (20 – 30 minutes):
 - a. What concept or idea, that you are currently not doing, do you feel would have the most impact in your practice and why?
 - b. Did this section give you any validation to how you are doing things, and if so tell us about it?
 - c. From the philosophy and approach in this section, what do you feel is your biggest gap?
 - d. What concept, strategy or idea will you implement in your business THIS WEEK?
- V. **Wrap up the discussion** (2 minutes)

Additional Notes for the Leader

- Let others answer first (Leader should provide their perspective after everyone else)
- Make connections between comments
- Occasionally direct questions toward quiet people
- Rein in tangents
- Allow for flexibility to be off topic as many of the best discussions are triggered by personal experience
- Don't feel obligated to get through all the questions



Ordering *The Advisor Playbook*

For individual orders:

US Orders: [Amazon.com](https://www.amazon.com)

Canadian Orders: [Amazon.ca](https://www.amazon.ca)

For large orders of 10+ contact Pareto Systems at:

Email us at inquiries@paretosystems.com or call 1-866-593-8020

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