

Better referrals serves  
*“all interests”*

- ∴ client
- ∴ prospect
- ∴ financial advisor



FLY: Optimize Actionable Ideas

# What is an Actionable Idea?



“It’s an idea whose implementation yields **benefits**”

# FLY Goal



To provide **actionable content** and the know-how to **deploy** it for firm growth. We **never stop** thinking about it.

# Commitment

Deliver a clear **firm-wide** commitment to add the selected actionable idea.

Also, explain the role this topic has in the firm's **strategic plan**.



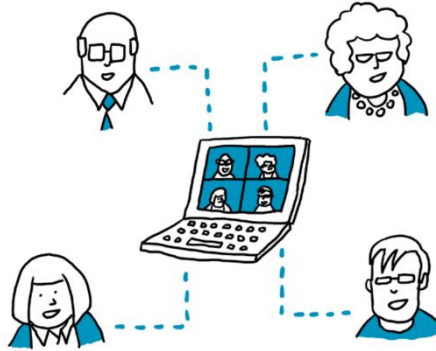
# Resources & Team



Ensure **resources** and **capabilities** are available for the project.

Select team members with the necessary **skills** and **motivation**.

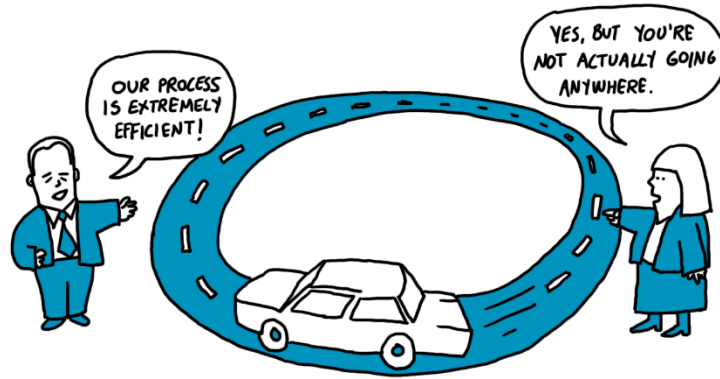
# Accountability



Clear accountability as to who is **responsible** for specific components of adding the actionable idea.

Each team member will know **their own** and **others'** roles.

# Focus



Focus on a **prioritized** set of action steps. Don't try to do **too much** or finish prematurely.

# Flexibility



Be flexible. It's not unusual for a project to **zig or zag** along the way. It's often **unavoidable**.



# Actionable Idea Plan

Answering 15 questions online provides a [one-page](#) Actionable Idea Plan. It's a consistent, repeatable playbook to [deploy actionable ideas](#).

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It's important because it benefits the [outcome potential](#) of each actionable idea you deploy.

# Actionable Idea Plan

## Goal Statement

Combining the **project goal**, its **importance**, and **what success brings** is the Goal Statement. Share it with your team.

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*“Our goal for embracing speaking events is to drive market awareness of the firm. Growth is an important component of the strategic plan for Mackinaw & Company. It allows us to expand into new markets.”*



# Actionable Idea Plan

Also included is an action plan providing clarity, and commitment. Stakeholders understand what needs to be completed, who is responsible, key dates, and ongoing progress.

# Actionable Idea Plan

## ReferralSafe

### Actionable Idea Plan Phil White, Mackinaw & Company

#### Goal Statement

Hi Phil, combining the project goal, its importance, and what success brings is now the Goal Statement. Share it with your team.

*"Our goal for embracing speaking events is to drive market awareness of the firm. Growth is an important component of the strategic plan for Mackinaw & Company. It allows us to expand into new markets."*

#### Action Plan

Creating and maintaining an action plan provides clarity, and commitment. All stakeholders understand what needs to be completed, who is responsible, key dates, and ongoing progress. Keep it updated, the Status, Target, and Actual fields are fillable.

Activity	Responsible	Status	Target	Actual
Project Launch	Phil White	Completed	Oct. 15	Oct. 13
Step One: Audience and Location	Mary Clark	Active	Nov. 15	TBD
Step Two: Pitch & Presentation	Jenna Hamilton	Active	Nov. 15	TBD
Step Three: Logistics	Luke Tyson	Active	Nov. 15	TBD
Rollout	Phil White	Future	Dec. 1	TBD

#### Key Points

1. One person owns the project.
2. Keep step descriptions specific.
3. Each step has one person responsible for it.
4. Share progress.
5. Celebrate success.

#### Phil You've Got This

It's all here, the project goal, why it's important, and the success it provides Mackinaw & Company.

Plus the action steps, stakeholders, and key-dates for achieving the goal. You are prepared for any status request.

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# Success



Celebrate the project team and process

1. Recognize and reward great work.
2. Advocate the use of the Actionable Idea Plan.

## NEXT

1. Actionable Idea(s)
2. Actionable Idea Plan

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