

NAVIGATOR

Welcome to NAVIGATOR

Chances are you'll have colleagues who are confused about what NAVIGATOR is. Here is a short description you might share with them.

Often we are asked, "Is Navigator a course?" The answer is "not really". So I'll explain.

Navigator is a capability building product resulting in more referrals and introductions. Step-by-step, we show what to do, provide special tools, and share new ideas regularly. Growing your firm is all we think about. Let's begin.

Welcome to your step-by-step digital guide for getting more referrals and introductions. NAVIGATOR provides a capability-building answer for progressively reaching goals. Actionable ideas, digital tools, and instructional videos each develop advisor skills.

It's a three-phase process. For best results, complete the WALK and RUN phases sequentially. Then view the FLY elements in any order.

1. The WALK goal is to develop an understanding of two problems, identify solutions to those problems, and explain the steps to follow to resolve them.
2. The RUN goal is to provide expertise to easily identify clients willing to refer you to someone they know.
3. The FLY goal is to provide actionable content and the know-how to deploy it for firm growth.

Here's a link to the ["Welcome to NAVIGATOR"](#) video.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the [Navigator website](#) often for new additions.