



Accountability Coach

Position Description

Bachrach & Associates, Inc. (BAI) is the premier professional development firm for the Financial Services industry. We are searching for professionals who enjoy coaching others to achieve their goals while achieving your own. If you interview successfully for this exempt position, you will receive intense training on our proprietary programs and resources which will enable you to provide accountability coaching, guidance and advice to our Clients that will maximize their return on investment relative to BAI Resources, Programs and Services.

Role: The Accountability Coach (ACC) is primarily responsible for:

- developing a high-trust relationship with his/her Financial Advisor Clients
- helping Advisors make the choice as to whether or not Values-Based Financial Planning™ (VBFP) will be the philosophy and process they follow for gaining and keeping their Clients
- coaching Advisors to identify the action items required to achieve the Advisors' goals
- gaining an agreement and commitment to place these action items on their calendars
- holding the Advisors accountable to doing the work their goals require to achieve them

Coaching is conducted through a high-trust relationship that is consistent with BAI's core philosophy, and through this coaching (by phone), ACCs earn the right to have their advice and guidance respected and followed. Clients are directed to invest in BAI Resources, Programs and Services if/when the recommendation is in the Clients' best interests. Clients are advised against making investments that are incompatible with helping them achieve their personal and professional goals.

Accountability Coaches work almost exclusively by phone (appointment only), with cold-calling not permitted. As an ACC you are provided with superior training, a base of clients and prospective clients whom you will help be successful using our philosophy, processes, resources, programs and services. You will continue to build a Client Community by referral only following our proven process for doing so.

Compensation and Benefits:

This is a 6-figure income position for achievers with a track record of earning 6 figures. First year earnings are projected to be approximately \$90,000. Actual earnings are dependent on: 1) the ACCs' ability and speed in coming up the learning curve, 2) their "Way of Being" with their Clients, and 3) their willingness to put in the hours and effort required to be successful. Second year earnings are projected to be approximately \$104,000, again dependent on the above-mentioned factors and the ACCs' goals and commitment level. In the third year the ACC should typically earn approximately \$118,000. From the fourth year forward, a competent ACC should consistently earn \$126,000 to \$162,000. Above-average work and dedication can and should produce higher earnings.

Total compensation is performance-based, consisting of the following three components:

- **a annualized base salary** of \$60,000/yr in the first year, decreasing to \$54,000/yr in the second year, then \$48,000/yr in the third year, then \$36,000/yr from the fourth year onwards;
- **plus a Milestone Bonus** of \$4,000 for each \$50,000 of qualified revenue that the ACC brings in to BAI; this revenue bonus is uncapped in earnings opportunity; the bonus is based on Client progress as evidenced by appropriate Client investments in BAI Resources, Programs and Services;
- **plus an Achievement Bonus** for achieving the revenue that BAI expects the ACC to deliver each year; in Year One the bonus is \$6,000; Year 2 = \$10,000; Year 3 = \$14,000; Years 4+ = \$18,000.

Benefits (after 90-day waiting period) currently include: medical, dental, vision, chiropractic, acupuncture, and skills training as well as an employer-matching 401K program.

Job location: BAI headquarters: 8380 Miramar Mall, Suite 200; San Diego, CA 92121.

BAI Information: www.baivbfp.com; phone: 858.558.3200

Contact: Les Lyons; email: llyons@bachrachvbs.com



What does it mean to accept an Accountability Coach position at BAI?

by Bill Bachrach – Founder, Chairman & CEO

When ACC candidates are selected and agree to work at BAI, they have agreed to abide by the fundamentals of personal development. These fundamentals include:

- Invest in yourself;
- Do the work the goal requires to achieve it (more than a 40-hr work week);
- Follow our direction (be coachable, even if it is uncomfortable at first);
- Show up on time; do what you say; finish what you start;
- Be positive; be a team player;
- Be proactive;
- Be resourceful;
- Embrace and demonstrate honesty and integrity;
- Do whatever it takes to be successful (Effort x Effectiveness = Results)

Through the use of a proprietary, personalized resource known as the Success Road Map[®] (SRM), each Accountability Coach maps out their values, goals, current situation and desired situation to have a snapshot of what they want to accomplish in their personal and professional life. ACCs are asked to do “whatever it takes” to actualize their Success Road Map[®], even when an action may not be familiar, comfortable or convenient. The definition of being in the personal development world is having the willingness to do what is unfamiliar, uncomfortable or inconvenient when required, to accomplish the identified goals. In other words, they are willing to do what the goal requires to achieve it. Everyone who works at BAI will not only help others be more successful, they will become better and more successful themselves.

Accountability Culture: ACCs work with their Clients to identify specific action items necessary to actualize the Clients’ Success Road Maps[®]. They hold their Clients accountable to do the work necessary to achieve personal and professional goals. ACCs live and work in an accountability culture and therefore have strong awareness, powerful tools, skills and behaviors that they use to help their Clients achieve their goals.

ACC Responsibilities:

- Develop and execute BAI’s strategies for revenue growth and expanding the client base (through referrals only), while maintaining and broadening relationships with existing Advisor Clients, developing a Community of Ideal Advisor Clients.
- Develop and execute an account strategy that allows the ACC to achieve his or her personal goals as outlined on his/her Success Road Map[®].
- Perform daily reporting and other duties as assigned and complete general administration tasks.
- Additional responsibilities include coordination with other departments and supporting the BAI processes.
- Be present for and support Clients at BAI Academies held on weekends, currently 6 times a year (held in Jan, Mar, May, Jul, Sep, & Nov)



Qualities of a Successful ACC:

- Upbeat, can-do, self-confident attitude
- Excellent written communication skills
- Concise, direct verbal communication style
- Extraordinary listening skills
- Excellent and easily-understood phone voice, with the ability to follow scripted outlines
- Friendly, with a genuine desire to help people; an affinity for working with a service-oriented population
- Empathetic
- Competitive spirit, demonstrated through historical success in competitive arenas, with a history of six-figure income earnings or top-end five-figure earnings
- History of entrepreneurial or business (internal) initiative
- Ability and affinity to follow a process and complete complicated projects and tasks
- Demonstrated success in personal and work relationships: ability to resolve personal conflicts
- Reliable, with good judgment
- Focused on issues/problems until resolved
- Ability to learn quickly and on own (has at least an undergraduate degree, or ten-plus highly successful years of related work experience)
- Plans the work and works the plan
- Ability to use a process to solve problems
- Ability to improvise/think on his/her feet
- Uses confirmation and clarification skills (uses open-ended questioning techniques)
- Good attention to detail
- Demonstrated willingness to take direction; to be coached
- Ability to answer direct questions in an authoritative, concise manner
- Ability to independently plan and execute concurrent activities
- Flexible, adaptable and able to work well under pressure to meet deadlines
- Ability to build relationships on the telephone
- Enjoys talking to people on the phone 8-10 hours a day
- Background or experience in Financial Services industry a plus
- Proficient Internet skills
- High Microsoft Office proficiency, particularly Excel and Word
- Typing skills commensurate with work product requirements (min. 45 wpm)
- Experienced in the use of a CRM tool (e.g., ACT!, Microsoft CRM, or preferably GoldMine)



Role of the BAI Accountability Coach - Summary

The word “coach” is freely used in today’s society. Wikipedia defines “coach” as follows:

A coach is a person who supports people (clients) to achieve their goals, with goal setting, encouragement and questions. A coach helps clients to find their own solutions by asking questions that give them insight into their situations. A coach holds a client accountable, so if a client agrees to a plan to achieve a goal, a coach will help motivate them to complete their plan.

Current practices in performance coaching focus on non-directive questioning, provocation and helping clients to analyze and solve their own challenges, rather than offering advice or direction.

When a person coaches an individual client ... the initial task involves the coach and client working out a mutual understanding of the scope of work. Then the coach helps the client to prioritize their current needs and looks for ways to address any improvements ... coaches are not therapists.

A second approach to coaching involves finding a mentor, paid or not, with whom you personally connect and from whom you are able to receive constructive criticism. A coach should be able to give clear, concise directives which stimulate creative ideas by which you can move forward to achieve your goals. If this occurs, then the specific background of the coach may not be as important or relevant as their ability to facilitate focus, maintain hope, and build motivation.

The fundamental relationship the Accountability Coach (ACC) has with his/her Advisors is to:

1. **ASSIST** Advisors in determining what they want, both in business and, to some extent, in life. This is accomplished using a tool called the Success Road Map[®]. The road map is a valuable experience for Financial Advisors who desire to move forward with increased clarity, focus and confidence.
2. **HELP** Advisors judge the merits of Values-Based Financial Planning[™] and the Financial Road Map[®] as a methodology and process for more effectively serving their existing Clients and acquiring Ideal Clients. The goal is to assist Advisors in making an intelligent decision: *Is Values-Based Financial Planning[™] good for them and good for their clients?* Advisors selecting Values-Based Financial Planning[™] will have a higher probability of actualizing their goals and values as identified on their Success Road Map[®] than those who don’t.
3. **SUPPORT** Advisors in:
 - a. identifying and agreeing to the actions required to achieve their goals
 - b. ensuring they place these actions on their calendars
 - c. holding them accountable to actually completing the identified actions
 - d. celebrating their successes as well as discussing any lessons learned, and finally ...
 - e. repeating this cycle until they have achieved their Ideal Clients goal and their lives are virtually in that ideal place of harmony and joy, commonly referred to as “Nirvana!”

**The Accountability Coach is a member of the BAI Client Services organization,
led by Les Lyons, Vice President of Client Services.**