## The 7 Steps to Success - Implementing View's Turn-key Adviser Facilitated Estate Planning Platform



## **LECTURE 18 - OVERVIEW**

View is founded on the belief that we are only as good as our next performance.

We constantly seek adviser feedback on how to improve the platform, including:

- a. beta testing of unreleased model iterations;
- b. 'uber' style ratings at the end of each web-based meeting;
- c. emails to solutions@viewlegal.com.au.

We encourage advisers to similarly look to capture their learnings and the tool we recommend in this regard is known as 'AAR' or 'After Action Reviews'. Learn more here:

## AARs explained (podcast)

Interview with Chris 'Elroy' Stricklin from The Soul of Enterprise: Business in the Knowledge Economy in Podcasts.