

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

## LECTURE 5 - OVERVIEW

The 7 steps explored in order in this strategy paper are as follows:

### 1. JOIN THE COMMUNITY



Become part of the View adviser community - AdVIEWser

### 2. PROCESS



Understand each aspect of the adviser facilitated process

### 4. OBTAIN A SCOPE



Obtain an adviser facilitated package suggested scope and fixed pricing with 3 service levels to choose from

### 4. POSITION



Position your service offering with your customer considering which service level best suits the customer's objectives

### 5. CAPTURE



Capture your learnings, improve your systems – and View's

### 6. REFLECT



Sharpen your saw

### 7. REPEAT



Rinse and repeat

## STEP 1: BECOME PART OF THE VIEW COMMUNITY

Advisers wishing to use View's adviser facilitated platform must be accredited. Learn more [here](#).

And remember the mantra: “if in doubt; flick it out”. In other words, if you have any questions with any aspect of this step simply contact View at: [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au) or visit our [FAQs](#).