

#FPABizSol

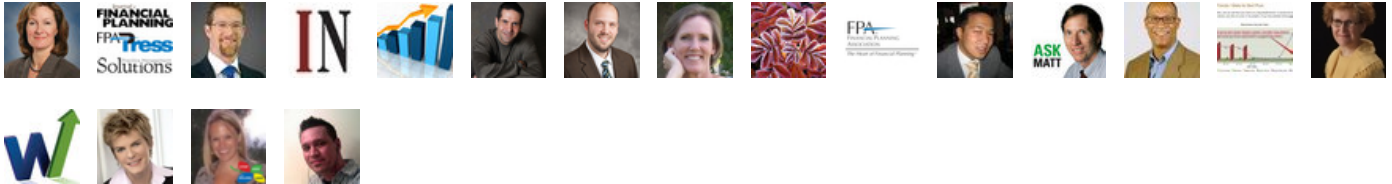
FPA Business Solutions 2010 Conference

Tweets (and RTs) from FPA Business Solutions 2010 Conference held March 1-3, 2010 in Dallas, TX.

Trending Words

#fpabizsol, rt, &, fpa, process, use, -, business, @billwinterberg:, ~cs, client, spenser, segal:, crm, solutions

Event Participants





@kjhulett Good seeing you at #FPABizSol in Dallas! It was fun recording a podcast with you. Look forward to seeing it on www.AdvisorPod.com.

04-Mar-10 03:17 | marieswift



RT @fpapubs: DMNs Pamela Yip: The best planners have technical knowledge, but are very approachable, too. #fpabizsol ~CS

03-Mar-10 18:14 | marieswift



RT @fpapubs: Stacy Reinhart: Use a 3rd party moderator for your client advisory boards - it creates an objective setting. #fpabizsol ~CS

03-Mar-10 18:11 | marieswift



RT @fpapubs: Julie Littlechild: A focus group has a different purpose than an advisory board; it's issue-specific (rebuilding your Web site). #fpabizsol

03-Mar-10 18:11 | marieswift



RT @fpapubs: Stephanie Bogan: Don't do client surveys to keep clients; do them to maximize the client experience and drive referrals. #fpabizsol

03-Mar-10 18:10 | marieswift



Stephanie Bogan: Don't do client surveys to keep clients; do them to maximize the client experience and drive referrals. #fpabizsol

03-Mar-10 16:56 | fpapubs



Julie Littlechild: A focus group has a different purpose than an advisory board; it's issue-specific (rebuilding your Web site). #fpabizsol

03-Mar-10 16:45 | fpapubs



Stacy Reinhart: Use a 3rd party moderator for your client advisory boards - it creates an objective setting. #fpabizsol ~CS

03-Mar-10 16:32 | fpapubs



An FPA Business Solutions Conference blog update from @ddjanowski (via @eventsfromIN): <http://bit.ly/cVzUtZ> #FPABizSol

03-Mar-10 16:00 | BillWinterberg



IN TECH | FPA Business Solutions Conf - Technology & Business/Practice Management. Read full blog here: <http://bit.ly/cVzUtZ> #FPABizSol

03-Mar-10 15:53 | eventsfromIN



DMNs Pamela Yip: Have educational sessions with clients. Tell them how you aim to manage their money in their best interests. #fpabizsol ~CS

03-Mar-10 15:14 | fpapubs



DMNs Pamela Yip: The best planners have technical knowledge, but are very approachable, too. #fpabizsol ~CS

03-Mar-10 15:12 | fpapubs



RT @TBlindedin: RT @eventsfromIN: IN's own Davis Janowski talks to advisers about how to use LinkedIn #FPABizSol (via @stephsammons)

03-Mar-10 03:53 | marieswift



RT @BillWinterberg: No time to tweet in realtime, so here are my follow ups to today's #FPABizSol: Mint.com tracks ~ 1/2 trillion dollars, adds 80k users/week.

03-Mar-10 03:53 | marieswift



RT @BillWinterberg: @MarieSwift: Recommends advisors write in a client-centered voice. More "yous & yours" and less "I & me." #FPABizSol

03-Mar-10 03:53 | marieswift



suggests this article recapping #FPABizSol
<http://www.investmentnews.com/apps/pbcs.dll/article?AID=/20100302/BLOG02/100309972>

03-Mar-10 03:41 | marieswift



RT @BillWinterberg: Spenser Segal: CRMs are not like baseball cards. You don't want to start a collection of them. #FPABizSol

03-Mar-10 03:02 | actifi



RT @BillWinterberg: George Tamer: Advisors need a disciplined approach to technology purchases, just like the investment selection & planning process #FPABizSol

03-Mar-10 03:02 | actifi



RT @BillWinterberg: Spenser Segal: Use colored sticky notes to identify each functional area touched by a process .fbs #FPABizSol

03-Mar-10 03:02 | actifi



RT @BillWinterberg: Spenser Segal: Any process defined above the 10 foot level is unexecutable by someone not skilled in the process. #FPABizSol

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RT @BillWinterberg: Spenser Segal: Any process defined above the 10 foot level is unexecutable by someone not skilled in the process. #FPABizSol

03-Mar-10 03:00 | samrichter



RT @BillWinterberg: Spenser Segal: Use colored sticky notes to identify each functional area touched by a process .fbs #FPABizSol

03-Mar-10 03:00 | samrichter



Chip Kispert: The biggest bang for the buck for advisors is moving from paper to electronic content management. #FPABizSol

03-Mar-10 01:20 | BillWinterberg



Chip Kispert: Multiply area occupied by 1 filing cabinet by \$/sq.ft. office lease to identify cost of physical document storage. #FPABizSol

03-Mar-10 01:19 | BillWinterberg



Spenser Segal: Use colored sticky notes to identify each functional area touched by a process .fbs #FPABizSol

03-Mar-10 01:16 | BillWinterberg



Spenser Segal: Any process defined above the 10 foot level is unexecutable by someone not skilled in the process. #FPABizSol

03-Mar-10 01:15 | BillWinterberg



George Tamer: Over 2,400 advisors have used TD Ameritrade's Roadmap process but TD has yet to extract common procedures from data #FPABizSol

03-Mar-10 01:14 | BillWinterberg



George Tamer: Advisors need a disciplined approach to technology purchases, just like the investment selection & planning process #FPABizSol

03-Mar-10 01:11 | BillWinterberg



Day 2 of FPA Business Solutions: George Tamer: Provided another recommendation to identify workflow using sticky notes #FPABizSol

03-Mar-10 01:10 | BillWinterberg



Blog about Hulett session at BSC with links to handout and related article, etc.:
<http://practicemanagementblog.fpanet.org/> #fpabizsol ~CN

02-Mar-10 22:25 | fpapubs



George Tamer of TD Ameritrade - People, Process & Technology - session. Re: People - MEASURE MANAGE REWARD #FPABizSol

02-Mar-10 18:34 | Idgcoach



Kirk Hulett: Millennials may not be loyal to a company, but they will be loyal to a leader or manager. #fpabizsol

02-Mar-10 17:58 | fpapubs



Kirk Hulett: Attributes of Millennials: comfy with tech, multitaskers, connected, prefer typing to handwriting, #fpabizsol

02-Mar-10 17:56 | fpapubs



Kirk Hulett: To successfully work with Millennials you need to adjust the way you lead and manage. #fpabizsol ~CS

02-Mar-10 17:55 | fpapubs



Biggest mistake in creating a variable pay program? NOT tying it to expenses, says Securities America's Kathy Shotkoski #fpabizsol ~CS

02-Mar-10 16:16 | fpapubs



Daily stand up meetings in your office can improve engagement -all staff, 10 minute mtgs to focus and prioritize daily activities #FPABizSol

02-Mar-10 15:27 | Idgcoach



Shotkoski-Cites top 5 ways to improve engagement-Communication, Vision, Performance Mgmt, Professional Development, Recognition #FPABizSol

02-Mar-10 15:24 | Idgcoach



Shotkoski - "An engaged employee has an emotional & intellectual commitment to an organization." #FPABizSol

02-Mar-10 15:13 | Idgcoach



Time for the first morning session-Kathy Shotkoski to talk about employee engagement, loyalty, morale & purpose in the workplace. #FPABizSol

02-Mar-10 15:06 | Idgcoach



Gearing up for day 2 of #FPABizSol. Bright & sunny but cool; definitely better than yesterday's rain.

02-Mar-10 14:27 | BillWinterberg



"It's time for a radically different business model--time to OVER promise and OVER deliver" says @RickBarreraTips #FPABizSol

02-Mar-10 14:23 | Idgcoach



Rick Barrera is talking about "How to design & deliver Extraordinary Customer Experiences" #FPABizSol @RickBarreraTips

02-Mar-10 14:19 | Idgcoach



Web 2.0 Boot Camp big success. Out to dinner tonight with FPA leaders in Dallas. #FPABizSol

02-Mar-10 06:24 | marieswift



RT @BillWinterberg #AaronPatzner, CEO of #Mint.com: Financial goal tracking...by 5/10; also planning better cost basis tracking. #FPABizSol

02-Mar-10 06:20 | TweetTweet



CRM report the hot item at BSC today. Find blog with links here: <http://practicemanagementblog.fpanet.org/>, #fpabizsol

02-Mar-10 04:30 | fpassociation



Lazenby: 4 practitioner mistakes: 1) Too much advice giving 2) Too much thinking about what to say instead of listening #FPABizSol

01-Mar-10 23:13 | BillWinterberg



Correction: David Lazenby said to record client meetings & review them objectively afterwards (not Gary Klaben). #FPABizSol

01-Mar-10 23:11 | BillWinterberg



@SafetyInNumbers Yes, I forgot the #FPABizSol hashtag on this tweet: <http://twitter.com/BillWinterberg/status/9846207096>

01-Mar-10 23:09 | BillWinterberg



Gary Klaben: Record client meetings & review them objectively afterwards to improve your communication methods. #FPABizSol

01-Mar-10 23:08 | BillWinterberg



@MarieSwift: Recommends advisors write in a client-centered voice. More "yous & yours" and less "I & me." #FPABizSol

01-Mar-10 23:06 | BillWinterberg



Potential advisor co-branded version of Mint.com (IMO) won't have any custody issues. Advisors never see client credentials. #FPABizSol

01-Mar-10 23:00 | BillWinterberg



@BillWinterberg #FPABizSol great to hear! Many of my clients use mint now to track their spending.

01-Mar-10 23:00 | Fiduciary_Guy



Aaron Patzer, CEO of Mint.com: Financial goal tracking anticipated by May 2010; also planning better cost basis tracking. #FPABizSol

01-Mar-10 22:58 | BillWinterberg



No time to tweet in realtime, so here are my follow ups to today's #FPABizSol: Mint.com tracks ~ 1/2 trillion dollars, adds 80k users/week.

01-Mar-10 22:54 | BillWinterberg



I'm back from day one of #FPABizSol after addressing CRM necessity w/ @ddjanowski & @ldgcoach. 45 minutes went by too quickly!

01-Mar-10 22:30 | BillWinterberg



RT @eventsfromIN: IN's own Davis Janowski talks to advisers about how to use LinkedIn #FPABizSol (via @stephsammons)

01-Mar-10 17:01 | Tblinkedin



Smarsh is at #FPABizSol - Aurel is ready for your questions about email archiving & social media archiving for FINRA 10-06 compliance

01-Mar-10 16:59 | adamatsmarsh



@ddjanowksi great job on the LinkedIn discussion today! #FPABizSol

01-Mar-10 16:59 | eventsfromIN



RT @stephsammons: RT @eventsfromIN: IN's own Davis Janowski talks to advisers about how to use LinkedIn #FPABizSol

01-Mar-10 16:48 | lecreative



RT @eventsfromIN: IN's own Davis Janowski talks to advisers about how to use LinkedIn #FPABizSol

01-Mar-10 16:44 | wiredadvisor



Check out Andy Millard's Blog -- created yesterday at #FPABizSol pre-conference boot camp powered by Impact Com and FPA <http://bit.ly/bnVefy>

01-Mar-10 15:17 | marieswift



Headed to the Omni Mandalay Hotel at Las Colinas for #FPABizSol: <http://www.fpasolutions.org/>

01-Mar-10 14:46 | BillWinterberg



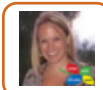
FPA Business Solutions attendees, get complimentary wifi w/ Omni Hotel's Select Guest program: <http://bit.ly/cGXBzw> #FPABizSol

01-Mar-10 04:08 | BillWinterberg



Me too! RT @ldgcoach: Looking forward to joining @BillWinterberg on an FPA Business Solutions CRM panel: <http://bit.ly/FPABizSol> #FPABizSol

01-Mar-10 03:25 | BillWinterberg



RT @ldgcoach: Looking forward to joining @BillWinterberg on a CRM panel for FPA Business Solutions: <http://bit.ly/FPABizSol> #FPABizSol

01-Mar-10 01:55 | KristenLuke



Looking forward to joining @BillWinterberg on a CRM panel for FPA Business Solutions: <http://bit.ly/FPABizSol> #FPABizSol

01-Mar-10 01:46 | ldgcoach



Headed to Dallas for #FPABizSol. Will also lead the first ever Social Media Boot Camp powered by FPA & Impact Communicatns. Sponsored by TD.

27-Feb-10 18:14 | marieswift



RT @eventsfromIN: Don't miss the Tech Expo at FPA Business Solutions 2010 "LinkedIn for Advisers" <http://bit.ly/8Y47oM> #AdvisersLinkedIn #FPABizSol

27-Feb-10 18:12 | marieswift



RT @eventsfromIN: Looking forward to the conference, we'll be tweeting! RT @BillWinterberg FPA Bus Solutions 2010 Conf Hashtag <http://ff.im/gA6HE> #FPABizSol

27-Feb-10 18:12 | marieswift



RT @marieswift: Checklist for those attending Web 2.0 BootCamp Sunday: <http://bit.ly/bg1h8C> #FPABizSol

27-Feb-10 16:52 | BillWinterberg



RT @adamatsmarsh: We're excited to be at #FPABizSol this year - visit Smarsh & chat w/ Aurel about our suite of financial technology services next week!

27-Feb-10 16:49 | Blumanfry



Don't miss the Tech Expo at FPA Business Solutions 2010 "LinkedIn for Advisers" <http://bit.ly/8Y47oM> #AdvisersLinkedIn #FPABizSol

26-Feb-10 17:54 | eventsfromIN



We're excited to be at #FPABizSol this year - visit Smarsh & chat w/ Aurel about our suite of financial technology services next week!

26-Feb-10 17:14 | adamatsmarsh



Looking forward to the conference, we'll be tweeting! RT @BillWinterberg FPA Bus Solutions 2010 Conf Hashtag <http://ff.im/gA6HE> #FPABizSol

26-Feb-10 16:17 | eventsfromIN



RT @BillWinterberg: I put the finishing touches on a CRM presentation for FPA Business Solutions: <http://bit.ly/FPABizSol> #FPABizSol

26-Feb-10 13:49 | marieswift