

Workbook Module 3 Interactive Worksheet

Creating Your Ideal Client Proposition

Questions to consider:

1. Have you identified (as best you can for now) who you really work with and what their top 5 issues are?

2. Have you segmented your client base into A, B, C, D, X and P categories? Is this done in your back office or CRM system so everyone on your team can identify which client is which when they call?

3. Have you identified those clients that just don't fit and taken action to let them go from your business? (or at least written and notified them of your "you call me" service option).

4. What are the "basics" that every client would expect to receive from you (or any other adviser)?

5. What "extra's" need to be in your service offering as well? Is there anything that is unique or specific to your client base in your locale? If so, add it in.

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6. Once you have crafted your service package, check back to ensure it addresses the top 5 issues that you believe that client segment is facing.

7. Ensure that each service package achieves that for each and every segment you work with.

8. Give each service package a name that is appropriate for each segment you work with. Try to be creative and make yourself stand out.

9. How are you feeling now about your offer to clients? Do you have more confidence in what has been put together?

10. Have you identified the Internal Service Standards you will follow as a team to deliver what you have promised? Are there areas you (or your team) might need some training and development on to really hit the mark?

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