

Workbook Module 4 Interactive Worksheet

Pricing Your Service Perfectly

Questions to consider:

1. Do you have some good questions to ask clients at the first meeting?
2. Is cashflow modelling at the heart of your service? (For new and existing clients)
3. What are your 4 Ps? Do they make sense when viewed as a whole?
4. If not, what would need to change to get them making sense for your business?
5. What about your 4 arrows? Do they all face the same way?
6. If not, what needs to change to make them line up?

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7. Where and how much do you charge in the sales/advice process for clients? Does this line up with where the value is added in the clients mind?

8. Which pricing strategies (that we discussed in the power point presentation) make most sense for your clients?

9. Create your standard charging menu. This should be for the 80% or more of clients that are your typical client. Don't worry about the exceptions for now. Where and how much do you intend to charge at each part of the process?

10. Consider some of the exceptions that might arise? For example, younger accumulation style clients with less investable assets. Will you deal with them at all? If so, how might you need to adjust or flex your pricing approach to meet their needs (as well as yours)?

11. Do you feel like you have a great offer, suitably priced? If not, why not?

12. Do you feel confident in your new approach? Or at least confident enough to give it a try at the coalface?

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