

Questions that highlight your value promise

Habits of highly effective financial professionals

Potential clients look for distinction, not just something different. They want to know what sets you apart and what you've done for others like them.

Value is delivering on your promise

What value do you bring your clients? What challenges do you help them solve?

When financial professionals are asked, "Why should I do business with you?" they often answer:

- "I run a unique wealth management practice."
- "My firm has many years of experience."
- "We deliver a very high level of personal service."
- "I create a comprehensive and personalized financial plan for you."

While these are great attributes, they focus on you — not your client. There's a big difference between messaging that tries to convince people to work with you, versus giving them a promise of what you'll help them accomplish.

The step-by-step process to creating your authentic value promise

1. Select five to seven of your best clients: those who will advocate on your behalf.
2. Meet with them individually, face-to-face, and say: "I want to position myself and my practice appropriately in the marketplace, and I need your help."
3. Ask these two questions, and write down their answers verbatim — not your interpretation.
 - "Why do you do business with me?"
 - Then ask (with some skepticism), "And WHY is that important to you?" Note: This answer is typically emotional and the real reason they do business with you.
4. Write down their answers. Look for key words that speak to your value.
5. Using only their words, craft three value promises that spell out what you accomplish for clients. Keep each four to eight words.
6. Then call each client you interviewed, read all three choices, and have them select one that best represents what you do for them.
7. Use the value promise with the most votes.

Actual value promises other financial professionals have uncovered and use

- "My firm will help protect your family's financial future."
- "I will personally help you navigate complex financial decisions."
- "We take a personal interest in protecting what you value most."
- "We can help you plan and achieve your financial objectives."
- "I will assist you in getting your financial life in balance."

Your unique value promise positions you distinctly from everyone else

Integrate it into your client-facing messages, including:

- Email signatures, voicemail messaging
- Letterhead, business cards, note cards
- Press releases, website, LinkedIn pages
- Trade show signage, event invitations, sponsorships
- Presentation folders, client cultivation pieces
- Reception area signage, meeting opening remarks

A value promise is more than a proposition

Remember: Your message and conversations are not about convincing people; they're about relating to and engaging them.

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