

Our 4 Pillars

The Mindset Method is a unique, purposeful and systematic approach to managing your client relationships. This program provides you with a pragmatic and sequential approach to building and enhancing relationships with both the new and prospective clients who you serve each and every day.

This program is broken down by best practices covering the following major topics:

Welcome & Your Vision

These strategies will introduce you to our philosophies and approach as well as, help us be clear on your vision and what matters most to you. You and your team will also learn how to prioritize and organize your time in a way that will help you achieve your goals.

Pillar 1: Client Analysis

These best practices will provide you with a framework for sorting and organizing your new and existing clients as well as, creating a heightened sense of awareness around the types of clients who bring to value to you and your business. It will also provide an opportunity to take a detailed 'snap shot' of where your business is today, which is important for guiding and measuring your future success.

Pillar 2: Client Experience

These best practices will provide you with specific information on how we will work together to build the foundation of strong client relationships based on trust. This includes a concept on how to create great chemistry with your most valued client, as well as a framework to consistently deliver an exceptional client experience.



Pillar 3: Client Onboarding

These best practices are dedicated to working with new clients and will outline the sequential steps of bringing on a new client as well as, ensure you are attracting the right types of clients. New client growth is important and each new client that comes to you provides you with an opportunity to fully introduce and welcome them to your business the right way each and every time.

Pillar 4: Client Rebranding

These best practices are dedicated to working with your existing high value clients and outline the sequential steps of rebranding to create strong brand loyalty. This is often an overlooked group – one that offers great potential! These clients not only need to be competitor-proofed, but are poised to become your advocates.

Road to Success

This final strategy is dedicated to helping you continue to progress forward with the concepts introduced to you in The Mindset Method. It provides you with a clear track to run on once the regular coaching calls are complete.