The Introduction Kit: A Branding Anchor

We emphasize the importance of creating Introduction Kits because they are used in a variety of important branding situations:

- They attract the right types of clients (New Clients)
- They update current clients so they understand who you are today (Existing Clients)
- They introduce you to others in your Professional Network (Strategic Partners)

In marketing terms, this is known as an aspect of branding. By branding yourself properly, you make yourself more visible, credible and desirable to your target market.

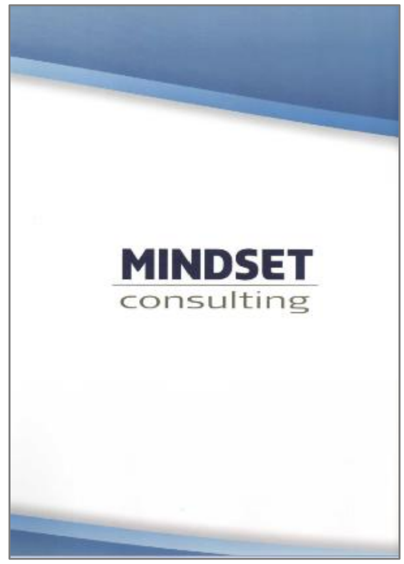
When you provide material that is mostly product or performance related, you're communicating the wrong message and worse yet, attracting the wrong types of clients.

How many times have you seen information kits which are simply an assembly of every product brochure available? Quite simply, being a product pusher isn't attractive enough to prompt a prospective client to 'take action'. Yes, this approach to providing information may be easy, but it isn't effective. It's important to remember that what you offer is a process, not a product. There is a huge difference. When you offer a process, you are creating a working relationship. This attracts the right types of clients.

Your Core Introduction Components

What follows is a list of some essential components for an effective Introduction Kit that will pique the interest of your ideal prospects.

1. Handwritten Card



To make a great first impression for the prospective client receiving the Introduction Kit, we recommend you include a quality card with a hand-written message inside. This personal touch may be small on the surface, but it makes an impression on people.

This level of personal care and attention won’t go unnoticed in our ever-increasing digital world.

2. Introduction Kit Cover Letter

Your Introduction Kit will be accompanied by a Cover Letter to set the stage for why they are receiving it in the first place. Since we have three distinctive uses for the Introduction Kit, there are 3 cover letters:

- New Clients – this is covered in Pillar 3: Client Onboarding
- Existing Clients – this is covered in Pillar 4: Client rebranding
- Strategic Partners – this is covered in our Strategic Partners section of the program.

3. Your Team Description

If there are others who assist you with client servicing, here is the place you want to introduce them. This piece describes those individuals you work with directly to provide service to your clients. The goal is not to write resumes here, but instead to briefly convey the strengths and experiences of anyone who is viewed as part of your client servicing team – and what their role is in the process.

This kit piece also reinforces the concept of working with other related professionals to ensure full coordination of your financial affairs, which may include experts who are not directly on your team but are affiliated through the same organization or represent a third-party.

4. Your Biography

This piece is a 'first impression' piece for you personally. It needs to be one-page, professionally presented and interesting – which means different from most of the bios out there.

<u>The Typical, but Required Bio Pieces</u>

Be sure to include a photo of yourself so clients know who they are meeting the first time they come into your office. You'll also want to include your experience and credentials – which is standard on biographies.

<u>The Not So Typical</u>

Include why you do what you do – this will make others believe in what you do and want to read more about you. It brings an emotional element to what can often be a dry and boring piece. In addition, be sure to include a paragraph describing who you are personally. This would include things that you are comfortable sharing about yourself about your interests, hobbies and passions. It may also include your involvement in other service organizations or clubs. People are driven by connections and the more they can connect to you outside of the work, the easier it is to build chemistry – an important aspect of trust.

5. Our Partnership with You

This simple piece positions your expectations of financial planning with clients, as well as what these clients can expect from you. It defines the criteria for a successful long-term partnership with your clients.

6. Our Partnership with [Insert Your Firm Here]

Potential clients may want to learn more about the firm you are associated with to establish further creditability. As such, you can provide them with a brief overview of the firm and the resources they have access to as a client because of that relationship.

7. Our Approach to Wealth Management

You should include a general description of your approach to providing financial solutions and how these solutions benefit your clients. You want to outline your well-defined and client-focused approach. And you want to do it in simple terms and emphasize the partnership approach. You may also wish to describe the sort of person who would most benefit from the specific solutions you provide – paint a picture. Make what you do interesting, and at the same time, showcase your integrity. This aspect of the Introduction Kit plays a key role in showcasing the process-focus of your approach versus the traditional product-focus of the competition.

Other Possible Introduction Kit Inclusions

These items are the 'extra' pieces that are not essential to the kit but can provide added value if you have them. Unlike the core pieces discussed above, these items are presented in the left-hand folder pocket.

<u>Article Reprints & Other 3rd Party Insights</u>

There is nothing like social proof, so include an article from a magazine or newspaper that lend credibility to your approach. Remember that the value you bring will be contrasted against the value that your prospect feels he/she is receiving from their current financial planner or advisor, so be sure that your kit contains value-added information.

If you do not have these 'extra' pieces, proceed with your kit without them. You can always add them later if desired, but we would not recommend you hold up implanting your Introduction Kit because these items are not ready.

Less is More

We strongly recommend you AVOID including industry material such as brochures or prospectuses. They do have their place, but it is not here. Again, don't associate yourself with products. If we lead with products and performance, we diminish the value of our process. Just because it's available and free doesn't make it the right thing to include. We want to follow the 'keep it simple' rule here.

All in the Delivery

As you know, consistent and professional letterhead, logo, business cards and a matching presentation folder are a must. Follow all firm-related marketing formats and compliance standards when assembling and delivering your Introduction Kits.