Hitting the "Refresh" Button

Think for a moment about your high value clients. Who is it that you've known the longest and how long have you been working with them? Think about the day they met you and what that might have looked like – as many as 5, 10 or 20 years ago. You've also spent much of this program re-tooling and enhancing various aspects of your client experience. You may have top clients that have already experienced some of these 'upgrades,' but you probably have a way to go to ensure that you have reached all your top clients.

The rebranding process is a methodical way to reposition yourself with your best clients so they are fully aware of who you are and what you can do for them today.

Keeping Clients Up to Date

One of the things you can count on in this industry is change, and it happens in so many ways. The list below identifies just some of the things that may have changed for you since you first brought on some of your very best clients.

What exactly has changed for you & your team?

- Your Approach – *comprehensive wealth management*
- Your Deliverables – *the PFO*
- Your Investment Approach – *investment conversion*
- Your Fee Structure – *changing or standardizing*
- Your Qualifications and Credentials - *specialties*
- Your Team – *new members*

Understanding What Matters Most to Your Clients

One of the benefits of having long-term clients is that they trust you and are usually easy to work with. Don't let the 'comfortableness' of this relationship lull you into a complacency. Get refocused on what's important to these special clients today and help them achieve it. Which means getting a complete update on their current situation. This is *their* opportunity to be heard and understood. In other words, it's equally important they update you.

The Personal Financial Organizer

Top clients need to receive their Personal Financial Organizer – the sooner the better.

Let's imagine a hypothetical situation where one of your best clients sends you her sister as a new client. Her sister is raving about the process, including the cards – the gift – and of course, the PFO Binder. She is thrilled to be working with you. Contrast this to how your client of 10 years (or more) is feeling, not having received a card – gift – or PFO Binder. Clearly this is not going to bode well for you.

We need to get out in front of this and proactively get these PFO binders into the hands of your top clients, simply because it's the right thing to do.

The Introduction Process

We've already discussed the fact that many of your top clients have 2 of the 3 key ingredients to being the 'perfect' client. All we need is advocacy.

We've also talked about the Introduction Process for months now, but your top clients haven't been exposed to it and certainly haven't had the benefit of repetitive, client-friendly reinforcement. The rebranding process begins to strip down the barriers that we know are most likely preventing them from referring you:

- Not aware you're accepting new clients (yes, this happens)
- Don't understand how to refer you to others
- Uncertain about what happens when they send someone to you

The Welcome Process

Trust us, they'll appreciate their *own* card and gift.

In addition to those items listed above, there may be other improved service items you want your best clients to experience. It could be seeing your Agendas, receiving a confirmation call, or any other improvement you've made along the way that enhances their experience with you.

Our comprehensive rebranding approach packages all of this in a way that will have your best clients thanking you for all that you do.