



PERSONAL BRANDING

Articulate your brand in words

Now that you have clearly identified who you want to work with—it's time to tell the world!

This worksheet is a series of exercises to help you verbalize your brand. Why would anyone struggle with this exercise? Because it's not the way people traditionally think about promoting themselves. You have probably used the "anyone and everyone" approach for years, defining your potential client as anyone who has money to invest. This exercise will challenge you to change strategies and cast a smaller net.

The elements of a successful pitch

A successful pitch has four parts: 1) Who you are. 2) Who they are. 3) What makes you a perfect fit to do business with them. 4) A call to action that deepens your connection. Let's start drafting your pitch, one part at a time, in the spaces provided.



Be sure to view the companion video, "Your Perfect Pitch," before you begin this worksheet.

1. Who you are:

The way you introduce yourself is vitally important. You have the opportunity to either endear someone to you or alienate them as soon as you open your mouth. Is your ideal client a relatively unsophisticated investor? A savvy executive? A creative type? Even the way you say your name has impact.

"Hi, my name is _____ and I'm a financial advisor with _____."

truefact

Always consider your audience. With certain clients, you might be better off avoiding the alphabet soup of CFP, CFA, CLU, etc. Just say, "I'm a certified financial advisor."

2. Who they are:

This is where the description of your ideal client comes into play. For example, "I work with successful female attorneys in Dallas, Texas, who are raising young children." Or, "I work with families in Enid, Oklahoma, whose children show livestock through 4-H to fund their college education." Use the specific attributes from the "Reveal your ideal" worksheet.

"I work with ..."

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PERSONAL BRANDING

STEP 2: YOUR PERFECT PITCH

trueyou

truefact

“Focusing on a niche and clearly articulating it involves believing that there will be an abundant supply of the person you defined as your ideal client.”

3. What makes you a perfect fit:

What do you bring to the table? Most advisors would be uncomfortable starting a sentence with, “I am the best because ...” and that’s a good thing! Instead, try using a story to illustrate what makes you exactly the right person to work with your ideal client. You could also talk about why you love what you do. “My favorite thing about my job is helping retiring veterans stay ahead of inflation.” or “My background in agriculture gives me insight into the goals of farmers,” etc.

With a well-crafted pitch, the next time someone asks what you do, you will have something to say that doesn’t just answer the question, it also compels the person to either: self-identify: “Hey! That’s me ...” or cross-identify: “That’s not me, but I know someone ...”

I am the best to work with because ...

truefact

A successful call to action is an offer to be of service—not an offer to sell a service!

4. An effective call to action:

No pitch is complete without a clear call to action. Use your pitch to be of service. Offer them multiple ways to engage with you: invite them to an event you are hosting; ask them to join you for lunch or coffee to discuss common interests; connect them with someone in your professional network; or tell them about how you helped another client achieve a lifelong dream. **You must find a way to expand your connection to this person, or your pitch is worthless.**

The responses you get when you introduce yourself give you valuable clues for making an appealing call to action.

- I meet with women clients once a month at Starbucks to talk about fashion trends and design. You should join us!
- I’m hosting a free seminar at my office next week about start-up college funds. Maybe your friend would like my card!
- One of my clients recently took his family to Brazil for two weeks. I enjoyed helping him set up the fund that helped make his dream vacation a reality. I’m hosting a lunch-workshop about special fund planning next Tuesday. Bring your husband and check it out!
- I meet up with friends on the tennis courts every Saturday. Would you like to join us?

Example: Suppose you said, “Hi, I’m Judi. I’m a financial advisor at XYZ, Inc. and I work with women executives in the New York fashion industry who love to travel, are saving for a dream vacation, and enjoy tennis. I enjoy helping my clients set up what I call a “fast-track college tuition plan” for their kids ...”

At right are various calls-to-action based on possible responses from the listener:

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