



PERSONAL BRANDING

“Today’s consumer marketplace is changing. Focusing on ‘I get you’ rather than ‘I get it’ will help you seal the deal.”

The art of the event

If done well, marketing events are the perfect backdrop for creating a relationship ... one where clients see you as a source of education and sound financial advice. The last thing you want to do is allow unconscious bias to impede your progress.

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Women have the highest propensity of any consumer group to recommend friends.

Building relationships builds business

When prospecting, your primary goal is to make potential clients feel confidence in you. Education and advice are secondary. Focus less on the products and services you offer, and more on building a human connection. When an event is structured around a core interest or community concern, you have the advantage of making your pitch implicitly, which is more effective. But, the most important aspect of successful event planning is to *never assume*.

Don't assume:

... **that you know what clients want.** Ask your clients and prospects for ideas. What concerns them? What would they like to learn? What do they like to do on a night out? Brainstorm with colleagues. Asking before planning could enhance turnout and increase your book of business.

... **that you know what interests them.** Some good topics include children’s online safety, real estate, work-life balance, social security planning, teaching kids about money and topics related to investing. Topics like health, fitness and nutrition also give women an opportunity to think about themselves—which is definitely encouraged.

... **that you have to host a large event.** Small doesn’t mean ineffective; nor does “event” have to mean a huge production. Determine the goal of your event—is it to educate a large group of prospects, generate leads or celebrate a milestone (retirement, promotion, etc.)? Either a large happy hour or an intimate lunch can serve well for reaching out to clients.



Be sure to view the companion video, “Event Planning,” before completing this worksheet.

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SEALING THE DEAL

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Your brand in action

Who: **Be inclusive.** Never assume that potential clients won't want to attend a certain type of event because of gender, age or some other reason rooted in unconscious bias.

Why: **Be focused.** What do you want your clients or potential clients to take away from the event? What do you hope to gain from the event? Keep these takeaways at the forefront when organizing your event.

What: **Be creative.** Marketing is one of the areas where unconscious bias can trip up even the most experienced advisor. You may think you've hit on the best idea ever, but it's only as good as your prospects and clients think it is.

When: **Be strategic.** Do your clients prefer lunch events, or after work get-togethers? Are they available on weekends? If it's hard for them to spare an hour, maybe shy away from large, time-consuming events and focus on smaller and more casual get-togethers.

Where: **Be flexible.** Whether you're planning a weekend getaway or an event up the street from the office, take transportation and venue occupancy into consideration. You want your event to be easy to get to and comfortable for your guests.

Finding what works

Whether you're planning a fishing trip or a 5-course sit down dinner, make sure your prospects enjoy their time outside the office (while learning about what you can provide). Not all events appeal to all clients, so ask for feedback to get a better idea of what hits the mark. Your clients may surprise you with their interests and needs—and certainly they'll be pleased that you are embracing them.

A brave new market

Today's financial market has a growing female segment. Reaching this client base is well worth the effort. Perfect your outreach and your practice will reap the rewards. But remember, when it's time to close the deal, the emphasis should be more about building a relationship than closing a transaction.

Next steps:

Once you complete this series, you will have a basic action plan to compete for clients in this vibrant market segment. Your next focus is on perfecting it.

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