

TURBOCHARGE YOUR BRAND



Differentiate

Brand distinction is all about what separates you from the competition. You may have an idea of what it is, but your clients know it firsthand. Start by determining your value in the marketplace, through self-assessment and client feedback.

Which clients should I ask for feedback?

New clients

Why did you come?

- What were you looking for when choosing an advisor, and what led you to us?
- What was the biggest factor in deciding to work with us?

Long-term clients

Why do you stay?

- What do you value most about working with me and my practice?
- What can we do to continue to earn your business?

Former clients

Why did you leave?

- What was the biggest factor in deciding to seek advice elsewhere?
- If you are working with another advisor, what does that firm offer that we didn't?

Clients think of my practice as ...

Identify three distinctive words that you want your clients to associate with your brand:

1 _____ 2 _____ 3 _____

My brand message

Describe your practice in a few sentences. Think about incorporating your personal "why" story and connecting it with what matters most to your clients. Don't worry about getting it perfect right now. Share with your team and let them help the message evolve.
