www.adviserQuest.com

ADDING VALUE TO YOUR ADVICE

Creating Your Unique Client Value Proposition: The First Step In Engaging Your Clients In A Fee For Service Practice

adviserQuest
Adding Value to Your Advice

ABOUT THE WORKSHOP

Helping clients appreciate what you do for them and the resulting value they experience is the first step to a successful 'fee for service' model of advice...

Being able to articulate and communicate the value of your advice, the justification of why your client should pay for your advice, what makes YOU the expert in solving their issues and helping them to achieve their goals is often a topic that most advisers still struggle with.

Now that we are transitioning to a fee for service model of advice you can no longer hope that your clients will understand the value of your advice without you first understanding this value yourself. If they are not clear on what outcomes you can achieve for them, and how these outcomes will benefit them personally, they will simply not pay for your advice. Your clients need to make a direct connection between achieving their outcomes and the fee they pay for getting that advice.

The most difficult part of the transition to fee for service is the client conversations. If you are to retain as many of your clients as possible and attract new clients, articulating the value of the new fee model to your clients must be done in a delicate yet confident manner. This workshop is all about understanding how you can communicate the value of your advice and exactly when you need to be integrating this value into your client conversations. Your understanding of your CVP is the key in charging your fees confidently and ensuring that your clients are never put off by the price of your advice.

Simply articulating, communicating and implementing your CVP will assist you to add an overlay of value to your advice. This is what we often call perceived value or the value that your ideal clients, who are often your biggest fans associate with your advice and services.

In this workshop we will take you through and unpack the structure of the CVP so that you will understand its components. This will be allow you to then create your own CVP in 5 simple steps. We will give you the framework which will assist you to create as many CVP's as needed based on your client segments or different groups that you service. We will also show you how you can tailor your very own conversational CVP so that you can communicate the value of your advice to any client. If you are serious about successfully transitioning to fee for service and want to thrive in this new era by doing things differently and more effectively, then this workshop is not to be missed!

TOPICS COVERED

- The benefits of creating and implementing your CVP
- When should your CVP be created?
- What does your 'ideal' client profile have to do with your CVP
- How will CVP assist you in segmenting clients, developing your service offering and your fee for service/pricing model?
- The CVP framework: How to create your CVP in 5 simple steps
- Things to avoid when creating your CVP

Your Investment:
$330.00 (inc GST)

Duration:
3 hours

ON SUCCESSFUL COMPLETION

You will take away the framework for creating a CVP which will assist you to build a strong foundation for the other components of transitioning to a fee for service model of advice such as your segmenting, pricing and creation of service packages. Most importantly you will have the skills to recognise when you are speaking to a prospect that fits your ideal client profile by using your CVP as a screening tool in conversation.

THEMES COVERED IN THIS WORKSHOP

- Unique Client Value Proposition (or CVP)
- Client engagement skills
- Communicating the value of your advice

WHO SHOULD ATTEND

- Practice Principals
- Financial Planners
- Accountants moving into Financial advice
- Practice Managers
- BDM's

WORKSHOP PRE WORK

All registered participants will receive some pre work materials which will enhance the skills and take aways on the day. Full instructions provided on registration.

CPD POINTS

ASIC Competencies
3.5 CPD Points Generic Skills
1.0 CPD Point Generic Knowledge
FPA Professional Dimension
- Capability
- Critical Thinking
- Attributes and performance

CPD POINTS
4.5 Points awarded on completion

To **REGISTER** go to www.adviserQuest.com or CALL US ON **1300 886 907**

If you are interested in having this workshop facilitated in-house please contact us on 1300 886 907 or email transform@adviserQuest.com

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REGISTRATION FORM

adviserQuest
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TAX INVOICE

ABN 94 122 726 943

1. PERSONAL INFORMATION

Title Mr ☐ Ms ☐ Miss ☐

First Name .... Surname ....

Address ....

Email (Primary Contact) ....

Employer .... Occupation ....

DOB (dd/mm/yyyy) .... Mobile (Primary Contact) ....

Alternative phone number .... Licensee Name* ....

* If you are currently an authorised representative of, employed by, or otherwise associated with a holder of an Australian Financial Services Licence (AFSL) such as a bank, stockbroker or financial planning company, please provide the name of that person or company.

2. WORKSHOP DETAILS

WORKSHOP	TOTAL

3. DATE & LOCATION OF ATTENDANCE

Date of Attendance: .... Location: ....

4. PAYMENT OPTIONS

Funds have been transferred to or deposited in the following St George Bank account of "AdviserQuest Pty Ltd"

BSB: 112-879 Account: 483 052 023

Bank of origin .... Reference ....

Transfer date .... (Please include your full name in the reference section)

OR

Credit card payment. Please debit my:

Visa ☐ Master Card ☐ Bank Card ☐

Name on card ....

Card number ....

Expiry date ....

3 digit security code ....

Cardholder's signature ....

CREDIT CARD AUTHORISATION

Your signature on this page authorises AdviserQuest to debit the nominated credit card with the total amount payable for the goods and services ordered on this form. You warrant that you are authorised to use this credit card to pay for the goods and services that you are ordering from AdviserQuest.

This document will be your Tax Invoice for GST upon completion and payment.