

Rewriting Your Own Headline

Make Sure Clients Understand What You Do

When a financial professional provides sub-par service, it's easy to understand why they don't experience a stream of introductions. What is most interesting is this next scenario. When a financial professional *does* provide great service and still doesn't experience a consistent stream of introductions. What would cause this scenario?

This may be happening because these engaged and satisfied clients (who although they are receiving great service) have not been through a structured process that demonstrates to them what their financial professional can provide them. Clients in this situation have only a vague idea of how they are being taken care of. They know they are receiving great service but aren't sure exactly what actions are creating this feeling. And, when they are given an opportunity to recommend their financial professional to family or friends, they are often unequipped to do so because they simply don't know how to.

Build Trust

Think for a moment about a time where you've personally introduced or recommended someone you know to a professional you've worked with. What was it that made you 100% confident in your recommendation? Was it the consistency with which you were treated? Or the fact they had a process? Or perhaps – it's both?



When there is a consistent process in place for clients, it takes the guess work out of what they might expect and creates a high degree of certainty and predictability. In other words, they generally know what their friend or family member will experience at every point leading up to becoming an actual client.

If your clients are unaware of the process, they are essentially taking a step into the unknown, which doesn't offer the comfort and familiarity of a process. This is usually not a comfortable feeling for anyone and certainly doesn't bode well for increasing their trust. Why would anyone want to introduce a friend or family member to this uncertainty? The more we can eliminate the personal risk associated with making an introduction, the more likely your clients are to refer others to you.

For us to create an environment worthy of introductions, we need to make sure our clients understand who we are and what we do, as well as, demonstrate the consistent use of a professional and client-focused approach with every aspect of our service delivery. Since virtually all products and services offered are common amongst the many different financial institutions and financial planning professionals, having a well-defined, professional process is a key differentiator. It showcases your integrity and accountability.