

KEYNOTE PRESENTATION



ADVANTUS MARKETING

ADVANCING YOUR MARKETING MOMENTUM

Elevating The Client Experience

Anticipating and Surpassing the Client's True Needs

Advisors and team members who create exceptional client experiences are the professionals who rise to the top in a sea of sameness. In today's value-compressed environment, it is imperative to develop a culture and set of operating procedures that balance the needs of your lower-tier clients, while honoring and exceeding the expectations of top clients. Every member of the team is part of the client's experiential process. This highly engaging session will help you integrate the critical strategies required to personalize and humanize The Client Experience and set a path forward in demonstrating your distinct value.

You Will Learn the Best Practices for:

- *Exemplifying your professional and personal brand*
- *Understanding the economic vs. emotional needs of clients*
- *Facilitating deeper client engagement*
- *What to say and how to say it*
- *Reshaping onboarding interactions and the client life cycle*
- *The Client Cultivation Calendar*
- *Creating an elevated service culture within your team*

Suggested Presentation Time: 60 minutes

