KEYNOTE
PRESENTATION

ADVANTUS MARKETING
ADVANCING YOUR MARKETING MOMENTUM

Reinforcing Your Ongoing Value to Clients

Communicating a financial advisor's ongoing value is complicated by fee pressures, competition, and a constantly evolving service model. Advisors try to set themselves apart from others, but in many cases, the message misses the mark. Your clients may be turned off if the message is not relatable or your client experience is not meeting their expectations. This essential presentation will help advisors personalize and humanize their client experience and solidify their ongoing value during every step of the process.

You Will Learn:

- How to speak from your clients' and prospects' point of view, not yours
- What to say and how to say it
- Reshaping deeper engagement throughout the client life cycle
- Reinforcing your value during the client onboarding process
- Reinforcing your value during client review meetings
- The Client Cultivation Calendar

Suggested Presentation Time: 60 minutes

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