



Provocative...

Insightful...

Opinion-Shaper...

*~Promoting the Value and Potential of People~*

# CREATING VIP CLIENT RELATIONSHIPS

A PRESENTATION FOR WEALTH PLANNING  
PROFESSIONALS

# SURVING...

## *People*

### INSIGHTFUL

Noticing what holds us captive to our past... seeing what needs to be seen for a future of endless possibilities...



### PROVOCATIVE

Bringing to life dormant thoughts and ideas that rest deep within... Promoting the potential yet to be experienced...



### OPINION-SHAPER

Clarifying the beliefs that matter... reinforcing self-trust and commitment to reaching new heights...



***Life is not about waiting for the storms to pass... it's about learning to dance in the rain.***

# TAKEAWAYS

“The goal is not to be better than the other man, but to be better than your previous self.”

- An old Hindu proverb

“If you change the way you look at things, the things you look at change.”

- Dr. Wayne Dyer

***“You must take personal responsibility. You cannot change the circumstances, the seasons, or the wind, but you can change yourself. That is something you have charge of.”***

**- Jim Rohn**

## ***To Help You See and Better Understand:***

- How to Differentiate Your Practice
- How to Accomplish More with Less Effort and Worry
- How to Broaden and Deepen Relationships with New and Existing Clients
- How to Embrace Conflict in Ways that Enhance Client Relationships
- How to Maintain a Positive Sense of Urgency about the Direction of your Practice

**“The range of what we think and do is limited by what we fail to NOTICE;  
And because we fail to NOTICE that we fail to NOTICE,  
There is little we can do to change;  
Until we NOTICE how failing to NOTICE limits what we think and do.”**

**R.D. LAING**



***“If the speed of change on the outside  
is greater than the speed of change on  
the inside, the end is in sight.”***

**JACK WELCH**

# MARKETPLACE



## Old Market

### Client Focus

- Best Product
- Best Solutions
- Best Services

### Sales Skills

- Answers
- Opinions
- Solutions



## New Market

### Client Needs

- Relationship with Trusted Advisor
- Value Added
- Adequate Solution

### Sales Skills

- Questions
- Observations
- More Questions

# IS SEEKING..

- Trusted Advisor Relationship
- Value-Add – Exceeding Expectations
- Adequate Solution(s)

People want to feel valued and acknowledged. Our performance in almost everything is enhanced when we're in the company of people who make us feel like we matter

~Deborah Norville

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The best minute you spend  
is the one you invest in people.

~ Ken Blanchard

## TODAY'S ADVISOR

# IS FOCUSED ON..

- Client's Need to be Heard
- Client's Intentions and Desires
- Client's Voice

Life is not about waiting for the storms to pass.. it's  
about learning how to dance in the rain."

~Author Unknown

# What's At The Heart of Your Meeting...



*It may look daunting from your current view but moving from customer relationships to client relationships broadens and deepens your impact and influence.*

## Old Focus



- **Product/Service**
- **Best Price/Product/Svc**
- **What I Say**
- **Selling**

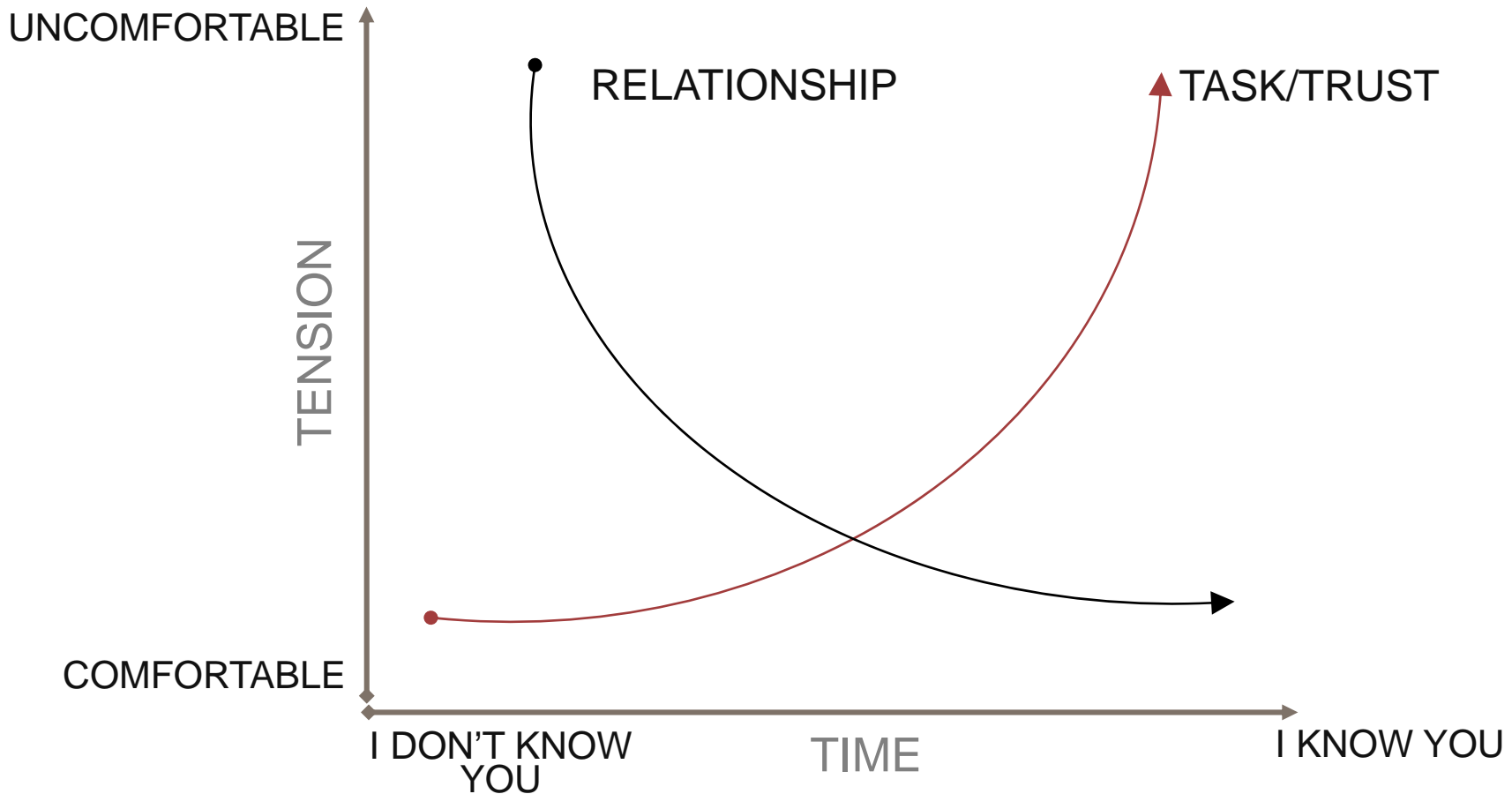
## New Focus



- **Client Intentions & Desires**
- **Value-Add/Exceeding Exp**
- **What Client Says**
- **Provide Options**
- **Determine Opportunity for Relationship Expansion**

# VIP CLIENT RELATIONSHIP

PROGRESSION



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