

Delivering an Elevated Experience that Creates Positive Word of Mouth

Presented By

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Why an elevated client experience matters and how to deliver it consistently.

What financially successful people say about an elevated experience:

1. Their experience with you is an integral part of their perception of _____ and _____ value.
2. Elevating their experience **illustrates you embrace a** _____ **approach over a transactional approach.**

Clients don't:

- Want to be taken for granted.
- Want to be just “an account.”
- Want to be part of the “client base.”

They do

- Want to be treated as an individual.
- Want to be remembered.
- Want an elevated experience, not just “good service.”
- Want to build a portfolio of great memories about their experience with you and your team.

3. An elevated experience is a clear point of _____ from other firms, advisors and choices.

Consequently

- **When you consistently elevate their experience, it creates**
 - **emotional chemistry,**
 - **stronger relationships,**
 - **repeat business, and**

- **brand advocacy.**

To deliver a consistent elevated experience focus your efforts on –
Delivering an Experience That Supports their Psychological Needs and Creates Advocacy

#1. Clients have a need to feel cared about.

To execute:

- A. _____ and humanize every interaction and communication by talking and writing to them as individuals.
- B. Be inquisitive about _____ **and know their** _____.
 Set up data capture and processes to send special notes on special days, as an example:
 - Their first investment, purchase or policy anniversary.
- C. Pay attention to the _____.

#2. Clients have a need for emotional AND economic security.

Emotional Security

- A. Create a “_____” for a discussion about their fears, uncertainties and doubts.
- B. Provide them with a 24/7 _____ in case of a family or business emergency.

Economic Security

- Reassure them that by working with you that you are a _____ for their financial needs.

3. Clients have a need for recognition and a sense of adequacy.

- Set up _____ on your best clients to track their industry, their interests and their passions.

When you meet a client or prospect be sure you are always _____ and...

- Be welcoming and say....

“Nice to see you” versus *“Nice to meet you,”* - even if you have never met before.

- Be sure to offer them a beverage and serve it _____.
- Be sure you ride the elevator to the lobby and walk them out of the _____ to their car.

4. Clients have a need for meaning and significance.

- Elevate your lobby, your space and your collateral so it is about _____ and aspirations.
- Every meeting and discussion should be about _____ agenda first.

“What are three things you would like to discuss or explore today?”

#5. Clients have a need for new experiences and exploration.

A. As part of your on-boarding process, _____
and capture key data points to strengthen your knowledge of and relationship with them.

Such as:

- What organizations do they belong to that support what they do for a living?
- What do they enjoy doing for recreation?
- What are their cultural and charitable interests?
- What type of social activities do they enjoy?

B. Educate to_____.

- For your best clients, provide quarterly “_____” calls on other products or services you provide.

The objective? Create emotional anticipation with information.

#6. Clients have a need for structure and a sense of belonging.

Focus on doing small client and prospect events and creating a _____ **around their passion and interests.**

Your Strategic Takeaways

- Clients and prospects **WILL** have an experience with you – **You get to decide what that will be.**
- An elevated experience **creates emotional chemistry, stronger relationships, repeat business and brand advocacy.**
- **Assess what you’re doing now and how you can improve** to better meet the psychological needs of both your clients and prospects.

As Maya Angelou famously stated

“I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”
Maya Angelou

