

The four success drivers of winning firms

How managed accounts can help you build enduring relationships with your ideal targets

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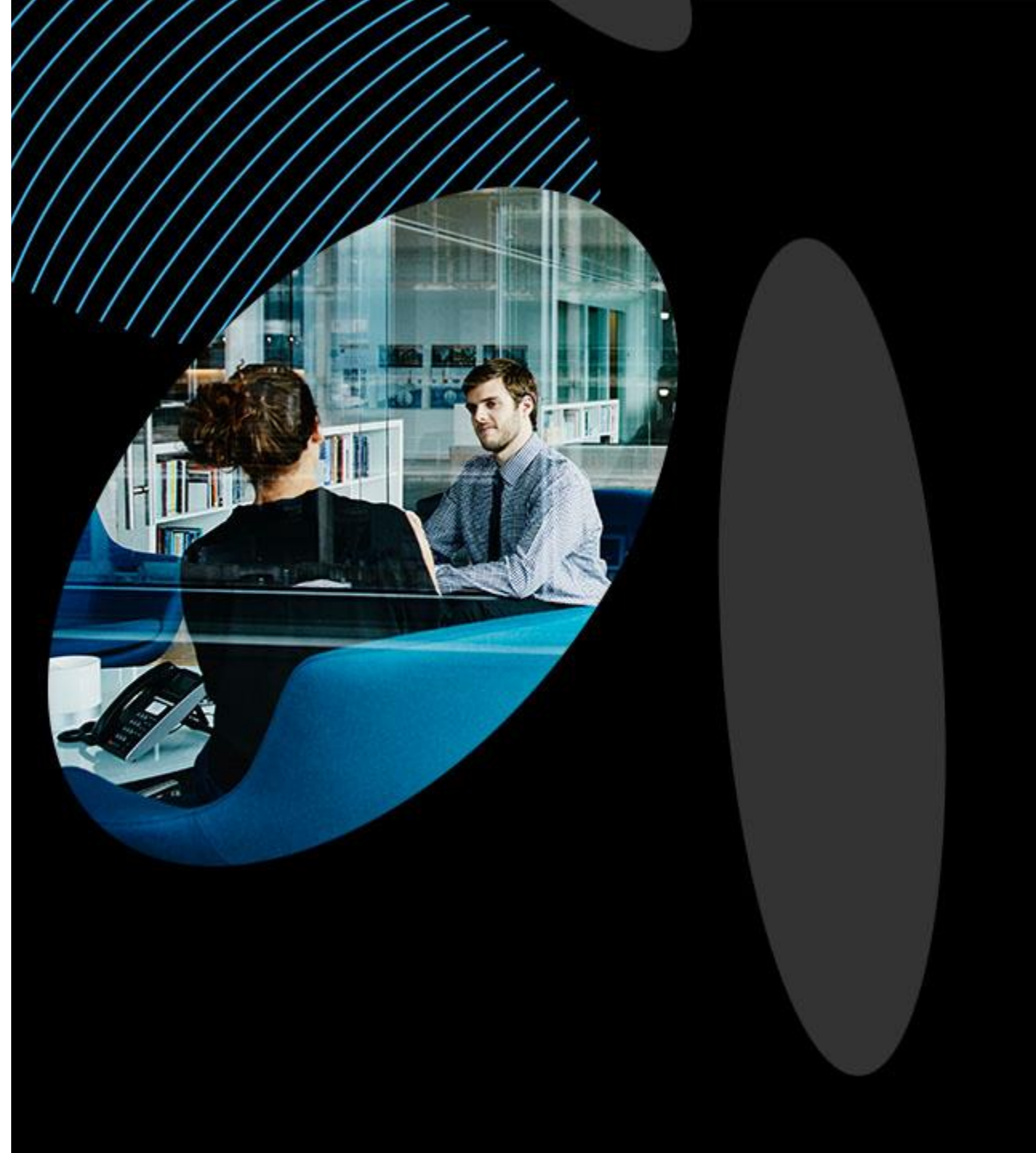
In today's session



4 success drivers of winning advice firms



Case study & discussion: Stanford Brown



The 4 success drivers of winning advice firms



Make better decisions and execute successfully



Have a strong, differentiated proposition



Understand the benefits of scale and have a plan for sustainable growth



Encourage a culture of ownership

Increasing client advocacy

Client Value Proposition (CVP), experience and articulation

1. Who is it for?



Bullseye ideal client

2. What do you do for them & how do you do it?



Features, benefits, proof points,
services, differentiation.



Client experience (CX) elements to
reduce friction and create positive
emotion.

3. How do you articulate it?



Firm-wide articulation that is
consistently conveyed across all
channels.

Discussion



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