

FOUNDATION

Outcomes

- Aligned and Cohesive Marketing Strategy
- Marketing Plan
- Tools to Support Visibility, Leads, Clients and Sales
- Cultural Alignment

CLIENT RETENTION

Outcomes

- Improved Retention, Cross-Selling & Referrals
- Client Service Standards

FIRM & NICHE REPUTATION

Outcomes

- Easier Path to Sales
- Quality Content and Media Attention for Visibility/Loyalty
- Ability to Earn a Premium Fee

LEAD GENERATION

Outcomes

- Leads Generated
- Less Partner Time
- Steady Lead Flow

LEAD NURTURING

Outcomes

- Robust Sales Pipeline
- Faster Sales Closed
- Less Partner Time

SALES PROCESS

Outcomes

- No More Pricing Wars
- Premium Fees
- Confident Sales on Value and Difference
- Consistent Sales Process

