

Building a Value Proposition

A value proposition is a clear statement that explains how your unique approach and services can help your clients. By clearly stating the purpose of the work that you do—for both you and your clients—the decision each client makes to work with you will be easy. A value proposition will help you articulate:

1. Your ideal client and how your firm is uniquely positioned to help with their financial needs (resonate).
2. How you will deliver specific services and benefits designed to help solve their challenges (differentiate).
3. Why clients should work with you, rather than someone else (substantiate).
4. The outcome of the work that you will do with, and for, your clients (key benefits).

This worksheet will help you think through and capture the elements of a well-defined value proposition.

INSTRUCTIONS:

Review each question and example and write up to three description/answer statements. Of the description statements you write, circle the one you prefer and use your circled description statements to capture your value proposition.

EXAMPLE:

We work with female executives who have the know how but not the time or desire to deal with the various aspects of their financial lives. (Target Client/Statement of Need)

We take the time to learn your values and vision of what financial success means to you and we use technology to consolidate and present a clear overview of all the moving pieces in your financial life. (How we Solve for your Problem/Our Differentiator)

Our firm will help reinforce all of the positive choices you have made, and will continue to make, in your lifetime. (Key Benefits)

Who is Your Target Client?

List profiles for three target clients. For example:

- People enjoying their retirement
- People approaching retirement
- Busy sales professionals

TARGET CLIENT DESCRIPTIONS

1. _____

2. _____

3. _____

Circle the best one.

Statement of Need, Frustration or Financial Problem

List the types of problems or frustrations that may be experienced by your clients. For example:

- Frustrated with attempts to generate income by low interest rates and volatile financial markets.
- Concerned that certain strategies will not produce the growth they need to fund their retirement
- Want to protect their loved ones from the unique risks of frequent business travel

STATEMENT OF NEED, FRUSTRATION OR FINANCIAL PROBLEM

1. _____

2. _____

3. _____

Circle the best one.

Statement of How We Can Help You Solve Your Problem

List how you can help solve your clients' needs, frustrations or financial problems. For example:

- Can help you protect your capital, generate income and minimize taxes to provide you with the income you need from your investments to live your desired lifestyle
- Will help you identify alternative investment solutions to get you back on track to your retirement goals
- Will help you develop a plan to achieve financial independence for you and your loved ones

STATEMENT OF HOW WE CAN HELP YOU SOLVE YOUR PROBLEM

1. _____

2. _____

3. _____

Circle the best one.

Statement of Principles and Philosophies

(See Value Proposition Vocabulary)

What do you believe? List out your top three. For example:

- We believe that the fiduciary status is not just some government regulation; it is a promise that we have always made to every client to provide them with the highest level of care possible.
- That investors across America may continue to be disappointed by unpredictable investment markets and fall short of producing the income they require to live the retirement lifestyle they had planned by following pre-2000 investment approaches.
- Planning for the financial independence of your family can be structured to accommodate your busy schedule by using technological innovations so you always know where you are today, where you and your family hope to be in the future and how you plan to get there.

STATEMENT OF PRINCIPLES AND PHILOSOPHIES

- 1. _____

- 2. _____

- 3. _____

Circle the best one.

Statement of Key Benefits

(See Value Proposition Vocabulary)

List some of the key ways in which people who meet your target client profile will benefit from working with you and your firm. For example:

- Generate consistently high levels of investment income, minimize volatility and clearly understand and avoid risks that may erode your capital
- Properly diversify your investment portfolio against unnecessary risk so you can gain peace of mind as you look forward to a happy and successful retirement
- Be able to provide for your family today and in the future, knowing that your family will be well cared for under any circumstances

STATEMENT OF KEY BENEFITS

- 1. _____

- 2. _____

- 3. _____

Circle the best one.

Building your Value Proposition

Pulling from all the components above, complete your **Value Proposition Statement** below.

For

Who

At (firm name)

We believe

We can help you solve this by

By working with us, you will

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