

Art of Articulating Your Value

Value Proposition Worksheet

Defining Your Professional Branding Strategy

Do your clients fully understand what you do, and do they appreciate your value beyond just rates of return? Do they focus on what you cost them, or on what you are worth to them? Can they describe you in a compelling way to a friend or family member?

A personal branding strategy ensures that prospects can contrast you favourably to their current advisor and ensures that your clients can describe you persuasively. One of the biggest benefits of a Personal Branding Strategy is that it ensures your clients fully and completely understand and appreciate the value you provide for them which, in turn, helps to insulate them from competitive factors.

Consider the following questions, and how you would answer them:

- What do you do?
- Who do you do it for?
- How do you do it?
- Why do you do it?
- How are you unique?



Four Step Value Proposition

Part of creating your brand is a value proposition.
Here are the four steps to help you find your brand:

1 Identify Your Ideal Client with Triple-A

Be clear about who you work with to make it easy for prospects to connect with you and your business. The goal is to find the words that allow you to have conversations with your clients and others who you work with about the value that you bring to the relationship. You want the conversation to be engaging, where people identify with what you are saying, and ask questions to learn more about you. Your words should create an aspirational environment, leaving your clients feeling that you are focused on their needs and issues, and those of their friends and family they choose to refer to you.

Use the Ideal Client Profile Tool to understand who you want to primarily work with.

My Ideal Client is:



2

Use F.O.R.M To Understand Your Ideal Client's Needs and Wants

Take the mystery out of what you do by focusing on your clients' needs. This is about what they want, such as their financial independence.

Write down a few notes about their true needs which will allow you to be focused in your conversations.

My Clients Want:



3

Remove the Mystery: Define and Communicate Your Process

What key words describe what you do? What would get your client's attention?

Tell your clients that you have an approach, method or process to get them engaged and encourage them to ask questions about what you do.

Keywords that describe my process are:





4

Make It Proprietary: Give Your Process a Name

The moment you call it something you take the abstract nature of what you do down to something you can conceptualize and understand.

Make it official, Trademark it!

I call my process:

Write Your Value Proposition below by incorporating all four steps:

My Value Proposition:

