



Prospecting Toolkit™ Overview

When opportunity knocks – how do you answer?

When prospects have little to inform their decision, it becomes vitally important to make your unique value proposition visible and to be seen as a better choice.

A professional deliverable made for new introductions.

We develop answers to the questions potential clients want to know and apply them across multiple introductory touch points to create a relevant and personal introduction.

The Prospecting Toolkit™ conveys your expertise, specialization and industry knowledge, with the following additional benefits:

- Creates distinction
- Affirms credibility
- Articulates the need-value relationship
- Focuses your message
- Acquires permission from the prospect
- Positions you as the right choice
- Develops loyalty

The Prospecting Toolkit™ includes:

- Brand Identifier™ questionnaire to initiate branding process
- Personal binder workbook and reference centre
- One-to-one consultation with Brand Strategist and Writer
- Design and development of custom Prospecting Toolkit™ 8 page brochure, pint folder, biography card and stationery items

“Avoid doing yourself a disservice by conveying an average service in a market that values specialty.”

Jeff Malcolm, President
AdvisorBranding

Core Components of Brand Development

- **Branding exercises and consultation:** Project binder includes the Brand Identifier exercise to define individual brand direction, marketing plan and highlight the 3 main components of the toolkit.
- **Identifying Value:** Outline that defines and allows IA to position their practice around unique attributes.
- **Strategic Significance:** Defining the value advisors provide their clients and packaging it for relevant positioning towards the natural market they will prospect. This will allow IA to better communicate their value to existing clients and new opportunities.
- **Selective Services:** Support team and IA work towards putting together a select list of services to reinforce and support his/her targeted messaging centred around a natural market.
- **Unique POS Approach:** We outline the IA's client process to convey how to become a client and facilitate how the engagement process works.
- **One-to-One brand consultation:** We work along side each IA to discuss and review brand direction and messaging. By working one-to-one we can review individual content to better define brand direction.

“Best-selling author Seth Godin puts it best: *You can no longer market to the anonymous masses. They're not anonymous and they're not masses. You can only market to people who are willing participants. You need to identify who your market is and create specific relevancy around your messaging targeted to them.*”

Jeff Malcolm, President
AdvisorBranding

Prospecting Toolkit™ includes:

- Ideation and concept development
- Copywriting & theme design
- High resolution imagery and photo usage
- Design layout of individual items
- Presentation of mock-ups
- Review of content and revisions
- Preparation of final proofs for approval
- Finalized design content and layout
- Preparation of production specifications
- Binder with practice-building exercises

Items within the Prospecting Toolkit™:

- Brand Identifier™
- Pint brochure (8 page)
- Pint folder (Ft/Bk cover)
- Biography card
- Stationery set & note card