



# Value Discovery Worksheet

There are five main sections in this worksheet. They are meant to provoke thought and discussion regarding your practice and the steps to generate growth.

## STRATEGY 1

### **Key Positioning**

What are you good at? Who are your ideal clients? Is there a common thread among your A-level clients?  
*(ex. HNWI, business ownership, retirement, family wealth)*

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How is the value of your suite of services conveyed? Why does your service matter and what is the value for your clients?

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How are you distinguished from others offering the same service? Can you make these benefits visible and tangible?

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# Value Discovery Worksheet *cont'd*

STRATEGY 2

## Perceptions

Look from the outside in – what perception are you creating with clients, new opportunities, COIs, Private Bankers? Are you establishing the presence of a leader? Do you present a knowledge base, skill set, service offering deeper than others?

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What are you doing / using to support your presence? Does it reinforce your abilities and service offering?

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Can you better convey the depth of your service, skill set, qualifications and expertise? Do clients and new opportunities understand what you do, do they have a sense of your value, approach and process?

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STRATEGY 3

## Client Experience

By providing client experiences and delighting clients you will heighten engagement.

Think about a client type (retiree, business owners, HNW family). What kind of experiences can you create for clients so they see you as irreplaceable?

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# Value Discovery Worksheet *cont'd*

Can you punctuate these talk-able differences with something tangible that clients experience and talk about?

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STRATEGY 4

## **COI Opportunities**

How effective are your COI, Private Banking and community relationships in providing new introductions? Do you have materials and/or processes in place to leverage these opportunities? Have you created a perception and commitment to these relationships?

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What ideas come to mind to enable thought leadership? Can you identify ways to set yourself apart from others with the community?

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Do you have relationships within any particular associations/firms, connected individuals or specific communities that could allow for a stronger targeted approach to new introductions?

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# Value Discovery Worksheet *cont'd*

STRATEGY 5

## Referral Strategy

What reasons do current clients have to refer your service to others? What is it about your practice that is most talk-able, memorable and remarkable?

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What tools do you have to help bridge the referral conversation, and facilitate the introduction process?

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What approach do you take with clients who are aging, planning their estate, or looking to transition a family business, to help ensure the transitioned wealth does not leave your practice?

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