



Revitalize Your Client Experience Program

We are proud to launch a new coaching and marketing program focused solely on helping advisors enhance their client experience. We will analyze all areas of the client experience and then create action steps to implement new opportunities to take your client experience to the next level. The result is that clients are happier, more content, willing to give referrals and appreciate your services.

The Two Module Program

Module #1- Defining Your Key Distinction

This is a laser-sharp one hour meeting with Rosemary to segment your client base, identify service level agreements for each of your client tiers, complete an analysis of your current client experience and then discover opportunities to add additional services, products and resources.

Module #2- Fast Track to Delivering the Value Your Clients Expect

This is a big-picture marketing evaluation where Sara spends one hour reviewing your marketing strategy to gain and maintain clients. She will also review your supporting tools and materials (website, newsletter, social media and web presence) to provide you with an initial analysis of your current marketing situation. This will be followed by 30 minutes of strategic advice on where to focus to get to the next level of success in client attraction and retention.

This 2 Module **Revitalize Your Client Experience Program** is 2 ½ hours and priced at \$600. Space is limited so call Rosemary today to get started at 1-250-380-5024 or email rosemary@rosemarysmyth.com.

Rosemary Smyth, MBA, CIM, FCSI, CAPM, ACC, is an author, columnist and an international business coach for financial advisors. She spent her career working at leading investment firms before pursuing her passion for coaching. She lives in Victoria, BC. Visit her website at www.rosemarysmyth.com. You can email Rosemary at: rosemary@rosemarysmyth.com and follow her on Twitter @rosemarysmyth

*Sara Gilbert, FMA, FCSI, CSWP, is Founder and Business Consultant of Strategist Business development. She brings over 15 years of wealth management industry experience to help wealth advisors develop and implement business building strategies. Visit her website at: www.Strategist.cc, you can reach her via email at: Sara.Gilbert@Strategist.cc
w: www.rosemarysmyth.com e: rosemary@rosemarysmyth.com p: 1.877.31.coach or 250.380.5024*