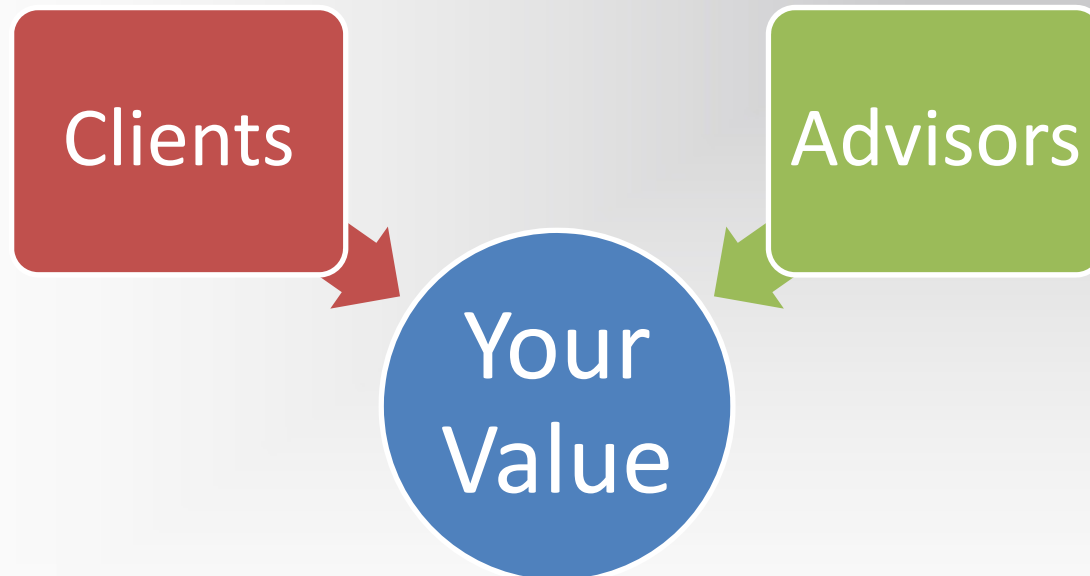


# Your Value Proposition

What it's really all about!



# Value Proposition – Two Perspectives



# What is a Value Proposition?

- A compelling expression of why people should do business with you
- Answers their questions:
  - What's in it for me?
  - Why you vs. the competition?

# Your Value Proposition starts the Client Conversion Process

## Attracting

- Communicate Value Proposition

## Nurturing

- Demonstrate capabilities

## Converting

- Deliver service

# Client Conversion Factors

$$\text{Conversion} = (\mathbf{M} + \mathbf{VP}) - \mathbf{c}$$

where:

**M** = Motivation

**VP** = Value Proposition

**C** = Cost



# Problems with Value Propositions

- There isn't one!
- There is one... but it is not clearly articulated
- There is one... but it isn't relevant to your market
- There is one... but it doesn't differentiate you

# What challenges does your Value Proposition present?

1. We do not have a clear Value Proposition
2. We do not effectively communicate our Value Proposition
3. We do not know if our value proposition matters to our target market
4. Our Value Proposition does not differentiate us from our competitors
5. All of the above

# What makes a good Value Proposition?

- From the clients' perspective – not yours!
- Clear and concise – no guesswork, no jargon
- Addresses emotions – not factoids
- Solves problems, makes life easier for clients
- Highlights advantage of doing business with you
- Benefits exceed costs



# Sample (Big Co) Value Propositions

- **Full Service, Full Advice** - We spare no effort to fulfil our mission to manage the world's most important investments – yours
- **Experience the full service difference** - trust in our proven expertise to build a wealth management strategy uniquely designed to help you achieve your financial objectives
- **Integrated, comprehensive and customized solutions** - give you confidence in your financial decisions and help you enjoy the freedom you've earned
- **Protecting what's important** – we have the solutions to help you protect yourself, your family and your wealth
- **For over 100 years** - our expertise, reputation and personalized approach to wealth management and investment portfolios have created lasting relationships with clients like you.

# Sample (Small Co) Value Propositions

- **Independent, 100% employee-owned** - focused solely on providing the individual investor with the widest possible array of both Canadian and international investment opportunities
- **Leading independent investment firm** - provides discretionary investment management services for individuals, families and foundations with \$1 million or more in investable assets
- **Leading independently owned investment dealer** - providing a full range of investment services to clients all across Canada
- **Helping you live your dream** - our unique processes make it easy for you to realize your life priorities and take advantage of our comprehensive, tailor-made financial solutions
- **Global perspective. Personal solutions** – a one-stop, full service brokerage and commodity futures firm providing a wide range of investment choices



# Helping Others Communicate our Value Proposition

- “Talk the talk” and “Walk the walk”
- Make sure your Value Proposition is:
  - Known by all stakeholders
  - Talked about consistently and frequently
  - Believable
  - Deliverable
- Consistency of messaging
- Quality materials, tools, media