



The Elite Adviser

INSTITUTIONAL STRENGTH INTELLIGENCE

The pursuit of excellence demands groundbreaking practices, acute insight and expert skills. Backed up by decades of rigorous study and practical application, the industry leaders at CEG Australia deliver precisely the tools and strategies you need to reach the elite level.

Jumpstart Your Success

*By Jim Stackpool
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Nearly all of the advisers I meet are quite motivated to make their firms more successful. Unfortunately, most of them are not taking the steps that will lead to substantially more success.

Why? Often, it's simply a case of being overwhelmed. They believe that they must make wholesale changes to their business from the ground up in order to move to the next level. As a result, they often choose to not act at all.

But you don't need to make sweeping, across-the-board changes to your business in order to see positive results. In fact, some of the best results can be had from relatively simple and subtle adjustments.

Begin by committing to taking the three following steps in the next 90 days. Each is highly achievable and will yield very substantial returns.

1. Define your compelling value proposition. Develop a value proposition that's compelling and appealing to the quality client. Define the specific value that you will offer these clients that will make them want to engage you and that, once you deliver, will delight them.

2. Create your ideal client profile. To identify and subsequently work with only those clients whom you can serve profitably and well, you first must know exactly what they look like. Create a profile of your ideal client that includes key characteristics such as age, occupation, geographic location and investable funds.

3. Establish a formal referral program. Referrals, the optimal way of obtaining qualified prospects, won't simply happen. To generate qualified referrals, incorporate a systematic referral request process that ensures that you meet and properly follow up with all the qualified investors your clients know.