

WHAT IF YOU COULD SELL 2-3 MORE SERVICES TO EVERY CLIENT?

Think about that – rather than endlessly worrying how to win new clients, you could massively expand the relationships your firm has in-house to drive additional revenue and profit.

Right now, you already have those additional services your clients need, want and would love to know more about.

Too bad they have no idea that your firm even has them.

How can we change that?

Client Loyalty Assessments from Leading With Courage Academy

3 WAYS TO WIN WITHIN 3 MONTHS

Our Client Loyalty Assessment (CLA) program will reveal 3 key ways to strengthen, upsell and win more high-quality business for your firm – all within 3 months' time:

1) SAVE AND STRENGTHEN CLIENT RELATIONSHIPS

Lose the assumptions. Break the dangerous status quo to improve client retention and set the stage for bigger things.

- Which client relationships are the most vulnerable to the advances of competitors?
- Pinpoint the essential changes in behaviors and processes your team needs to make right now.
- Define with absolute certainty the specific services and aspects of your firm that your clients value most.

Average number of services that clients say they need that they aren't aware their firms currently offer:

2.8 per respondent

(Continued on other side)



3 WAYS TO WIN MORE QUALITY BUSINESS

Client Loyalty Assessments
from Leading With Courage Academy

(Continued from other side)

2) EXPAND AND CONVERT

Accelerate organic growth by taking each client relationship to an entirely new level from here.

- Do you know how many additional services your existing clients need that you currently offer?
- The CLA reveals opportunities to provide additional services by understanding all the strategic issues facing your clients.
- The findings from the CLA identify which existing clients are the best ambassadors and referral sources for your firm.

3) INCREASE YOUR WIN RATE

Develop strategies for success to bring aboard new clients by utilizing authentic feedback from your existing clientele.

- Based on what current clients share through the CLA on what's compelled them to retain your firm and stay with you for the long haul, you'll be able to leverage more of their insights into your new business proposals.

If your clients are saying they're merely "satisfied," it's time to stop being satisfied with satisfaction and leaving money on the table.

Take the next step and talk to Leading With Courage Academy about one of the smartest investments you can make: Our Client Loyalty Assessment.

*Save one relationship,
sell one new service or
add a new client and
you'll have paid for your CLA!*

INSIGHTS

96% of unhappy customers
don't complain.

However,
91% of those will simply leave
and never come back.

- *1st Financial Training Services*

It takes 12 positive experiences
to make up for one unresolved
negative experience.

- *"Understanding Customers"*
by Ruby Newell-Legner



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