

The Triple “A” Approach

The following approach is used to identify your highest value clients. This segmentation enables specific client servicing and marketing initiatives to be implemented with this high value group, resulting in higher rates of advocacy which translate into the attraction of more high value clients.

Note: It is important to remember all of your clients have access to quality financial planning and investment management advice. However, there are several specific relationship-based service activities best suited for the highest value clients.

ASSETS

Assess Client Profitability

If the following applies, they are an “A” client.

- Has met your ideal client AUM or Revenue threshold.
- This person is best described as a ‘customer’ not a client.

ATTITUDE

Assess Client Attitude

If the following also applies, they are a “AA” client.

- You are their primary financial professional.
- They are enjoyable to work with for the reasons many you’ve defined.
- This relationship feels more like a partnership.

ADVOCACY

Assess Client Advocacy

If the following also applies, they are a “AAA” client.

- Consistently introduces you to 1 or 2 of their friends, family, colleagues or network every year.



Start Here

SPECIAL NOTE: Regardless of how you may classify your clients, all clients need to be provided the necessary service, management and ongoing monitoring as defined by the firm and other regulatory and compliance policies.