

Differentiated Planning Brand Worksheet

- 1 Pull up your Blueprint as a reference, specifically the section on Value Proposition. It should be used to guide the following thinking.
- 2 How do your clients feel after going through the financial planning process with you? If you don't know, ask some of your A or A+ clients.
- 3 List the three most powerful "thank you" messages you have received from clients.
- 4 Describe, in four words or less, what you do for your clients.
- 5 Answer the typical prospect's question, "Why should I choose you?" in five words or less.
- 6 What is the most authentic way you could describe what you do for your clients? If it doesn't inspire you or feel right, it's not there yet!

- 7 Develop a planning-centric value statement using the formula:
 - » **We exist to help (ideal client descriptor) achieve (successful end result) by (how you do it).**
 - » We exist to help women in the process of getting a divorce achieve financial independence by developing a comprehensive strategy that helps them navigate the unique complexities of finances during and after divorce.
 - » We exist to help philanthropically-minded families achieve their legacy goals by helping them create a financial plan that maximizes charitable giving both before and after their death.
 - » We exist to help “millionaires next door” achieve the clarity needed to retire with confidence by developing a comprehensive wealth management plan that includes investment management, risk management, estate planning, and proactive tax planning.
- 8 Determine which of the brand styles feels more authentic to you: directional (examples: GPS Strategy or Roadmap Strategy) or emotional (examples: Live Well Plan or Life Map Plan).
- 9 Using the above brainstorming results, have each member of your team (individually, don’t share yet) write down three possible planning brand titles for your planning process.
- 10 Choose the planning brand title that feels most authentic.

Still struggling? Consider using Sally Hogshead’s simple “Anthem” formula to create your tagline:

- » (Adjective) + (Noun)
- » How the brand is different (Adjective) + What the brand does best (noun)

Adjective examples:

- » Ambitious
- » Focused
- » Confident
- » Respected
- » Competitive
- » Results-Oriented

Noun examples

- » Precision
- » Flexibility
- » Execution
- » Follow through
- » Problem solving
- » Attention to Detail

Now write your top three adjectives and match them with the nouns from your list. Choose the combinations that best finishes this sentence: My distinct value is my ability to deliver... (example: Focused Execution).

1

2

3

Put this tagline through 4 filters:

Does it align with your vision and mission statement?

Does it clearly articulate what you do?

Does it evoke emotion?

Is it simple enough for your clients to repeat to their friends?



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