

## **“From Selling to Serving” Advisor/Banker Testimonials**

Below are just a few of the numerous testimonials we have received as to the impact of both organizations and advisors/bankers transitioning their practice to a “serve vs. sell” client experience.

**Mass Affluent Sales Leader** – *“Our team’s commitment to this approach has resulted in a 130% increase in our average revenue per sale.”*

**Wealth Advisor** – This advisor told us that he and his team engaged with a prospect who just sold his business for \$50 million. The client was impressed with the Promise and how committed they were to fulfilling it. He therefore decided to allocate one-third of his \$50 million to this firm along with two other providers. The advisor explained that though appreciative of his confidence in him and the team, they would respectfully decline as, based on their promise, it was not in the client’s best interest to split the assets among multiple providers. The advisor recommended with conviction that *“to do the right thing”*, he (the prospect) should choose one of the three advisors and put all the assets with them, even if not with his firm. The prospect followed through on that recommendation and gave the entire \$50 million to them, recognizing their commitment to doing what is right for him rather than just making a sale.

**Personal Banker for Large Bank** – *“My focus on truly serving my customers has led to them opening up to me like never before, and my sales are increasing as a result.”*

**Portfolio Manager** – This PM told her manager that after 20 years as a PM she was getting a little worn out and bored with what she does every day. But she explained to him that this has changed everything as she now has a purpose to what she does, and it has reinigorated her work life and how she interacts with clients.

**Wealth Advisor** – *“I have had several prospects thank me, saying ‘this is the best meeting I have ever had with an advisor.’”* (This is one we hear all the time.)

**Large Bank Financial Advisor** – *“I have been through dozens of ‘sales training’ conferences and this [client experience approach] is by far the most ‘human’ approach I have seen in my career. We get so caught up in our numbers and opening accounts that we forget that there is a customer sitting in front of us that needs our help. I do not believe any advisor is ‘experienced’ enough to NOT be better after [employing this approach]. My prospects are much more engaged and receptive now.”*

**HNW Client (Note to Provider)** – *“We are so impressed with you guys. The primary reason we are choosing to do business with you is because right from the start it was clear that you were not just trying to sell us something, but were truly trying to help us. We thank you for that.”*

**Wealth Management Team** – *“We are so much more successful because we are not desperate to sell something to every client and prospect. Our clients sense that, and therefore open up with us and trust us and our recommendations. And if the prospect is not a good fit for what we provide, we move on.”*

**In-Branch Financial Advisor** – This advisor engaged a bank customer who only came into the branch looking for a notary. While waiting, the advisor engaged him with detailed questions to assess how they could better serve him, and with pure intent, sought to identify areas where the customer may need some help. The customer commented on how he had never had a conversation like this with someone in a bank branch, and therefore wanted to meet again to discuss some of the potential issues the advisor raised. The advisor had no idea the customer was worth over \$100 million! They are now managing a chunk of those assets.

**Top-Performing HNW Advisor** – *“Over 30 years in the financial services industry and I’ve been through more than a few sales training programs to help me improve my effectiveness. This approach is the one that has caught my attention. I am here to tell you it works and has made a difference in how I engage with clients every day!”*

**Market Leader** – *“Our team is far more confident to stand behind our pricing as there is so much more clarity as to what we are offering and the value of it. It is because we are no longer trying to make a pitch, but fully engaged in trying to help our clients.”*