



CHRIS JARVIS

See Differently. Business Differently.

12-Day Turnaround with Chris Jarvis

Day 6 – Client Compass

You have analyzed your self and your practice. You have looked at the financials over the past few years. You have a pretty good idea of “Who You Are” and you know “What You’ve Done” so far.

What you don’t know is “HOW” you were able to do it. More specifically, you don’t know WHY clients have hired you.

It is not uncommon, when going through this analysis, for agents to find out what they thought was most important to clients was not the case. Why is this important? If you are spending a lot of time on things that are not important to your clients, this exercise could help you find loads of free time. I have never met anyone in our business who didn’t need or want more time. Since you can’t buy time, this could be the single most important exercise you do in your career.

To “Sales Differently,” we want to start by asking questions of the most important parties in our transactions – our clients.

Send this sample letter to your clients and tabulate all the responses. You may also choose to send it through www.surveymonkey.com if you are more tech savvy.

Dear (client):

I greatly appreciate the opportunity to work with you. I may not have shared it in so many words, but I have admired your success for some time. For that reason, I would like to ask you for some help. This should only take you 10 minutes and how you respond may be invaluable to my growth and success.

As I grow my business, I want to find more clients like you. I am not asking for any referrals or introductions (though I would graciously accept them). I am asking for some help in understanding why you chose to work with me. The better I understand how my clients perceive me and my value proposition, the easier it will be for me to attract and connect with people who will appreciate what I bring to the table.

Please answer the following questions as briefly or as in depth as you like. I will read every word and seriously consider each suggestion you offer.

Thank you again for your help.

Quick questions about YOUR NAME HERE

1. What were your experiences like with other financial advisors and insurance agents before you met me?

2. Why did you decide to take a meeting with me in the first place? Was it something I said or something someone else said?

3. Did I say or do anything different in our first meeting?

4. Do you work with me because of the products I offer?

5. Do you work with me because of the services I provide?

6. Do you work with me because of my credentials?

7. Is there something about the process I use?

8. Is there something about me as a person that is important to you?