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TOTAL CLIENT MODEL
WIN AFFLUENT CLIENTS FOR LIFE

THE TOTAL CLIENT MODEL: A VIEW FROM 30,000 FEET
IDENTIFY YOUR 10 BEST CLIENTS

VIDEO TRANSCRIPTION

John Bowen: Okay, let's make it real. The Total Client Model. I need your help. One of the biggest challenges in taking something as you're learning is to put it in practice. And to have the level of success that you want, one of the things that you need to do is you've got to execute well. So, in this module, what we're going to be doing is we're going to be taking very short, very easy. I want you to identify 10 of your best clients and we're going to take them through the process, the Total Client Model process. And I know you're going to have a little trepidation and so on, and one of the mistakes we see so many advisors do when we have the privilege to have him in our yearlong coaching program, is they want to go out and go after that one prospective client they've never gotten and try it with the most challenging person.

And I say, no, don't do this. We want to go first with the people that really trust you already, and these are your clients. And we're going to do it with them so that they can have really a great experience. And you're going to get better at this very, very quickly. And they already trust you, so it's going to make it easier. And you're going to get what to me is the most important part of this going forward is that you have quiet confidence in the process of the difference you're going to be able to make. So how do we go about identifying those 10? Well, these clients should be people that you know well, and you've worked with them for at least five years and you believe they're highly satisfied. So, in that extent, then you should just think of, who are the people here? And all we want is 10. And I got to tell you, what you're going to find is you're very likely to generate new revenue out of this.

Even if you think you have all their assets, it's very likely that you're going to. Now, one of the questions, and you'll see when I go into in the next module, what we're going to do is we're going to go into the actually doing the Total Client Model. And you're going to see a list of questions and you'll go, "Boy, if my existing clients, I should already know them."

And yeah, it would be perfect. We knew everything, but things have changed and so on. And this is an opportunity as you go through to really talk with them and set the stage and simply say, "Joe, Jerry, I really respect your opinion. We're in the process of changing the way that we do business." And we have a new process we call the Total Client Model that I'd like to take you through because I think it's going to really help us get a better understanding of your circumstance so we can serve you better. But at the same time, I'm going to ask you questions where I know the answer, but I want to treat you as if you're a new client, so I can get your feedback on the process. And when you do that, they're going to be more than willing to answer any of the questions. Okay, join me in the next video where we dive into the Total Client Model.