## STRATEGY 3: WORK WITH THE RIGHT AFFLUENT CLIENTS

## Influencer Interview Guide

### Questions to uncover the unique needs, challenges and issues—both financial and nonfinancial—facing your niche:

* What are the most pressing issues, concerns and problems facing members of the community? What keeps them up at night? (Probe further) What other issues, concerns and problems do you mainly hear from this community? (Then probe to get the top priority issues) Of all of those, what have you seen to be the most pressing issues and concerns?
* What are the major financial challenges faced by members of the community today?
* Where do you see the financial services industry really missing the opportunity to serve your community well?
* Have people in the community generally been successful in addressing these challenges? If not, why not?
* How would a financial advisor be most helpful to community members in solving their problems or achieving their financial goals?

### Questions to help you find out the best ways to connect to members of the niche:

* If you were me, how would you connect with people like yourself to deepen my understanding of the community?
* Where would I most likely find these types of people?
* What specific marketing opportunities in the community would you suggest? Why?

### Questions to identify outlets to which members of your niche belong and that you can leverage:

* Which social organizations do members of the community and their spouses typically belong to?
* What sports or activities do they generally enjoy?
* Which publications do they like to read?

### Questions to identify financial advisors in the niche and their value propositions:

* Which financial advisors are prominent in the community?
* How do they market to the community?

### Questions to identify other professional advisors with whom you could potentially form strategic partnerships:

* Which other advisors, such as attorneys, accountants or insurance specialists, do members of the community often work with?
* Would it make sense for you to introduce me to any so I can ask them a few of my research questions?

### Question to uncover additional influencers in the niche with whom you could potentially meet:

* Are there any other people like you, with a deep knowledge of this community, whom I should contact to find out more about what I could do to better serve the community?

### Question to catch anything you may have missed:

* Knowing what you know now, what else should I have asked you?