



Experience
the Power of
Collaborative
Thinking

My 30 Day Plan For Elevating the Client Experience to Stand Apart from the Competition

	Specific Area I need to Address:	Specific Action Steps to Proceed: When and How am I going to do this?	Specific Challenges/Obstacles to Overcome are:	The Date I will Complete:
1	Evaluate the experience I deliver to my A, B, and C clients.	When – within 48 hours How - Assess: 1- How much do I really know about their families, favorite activities and interests? 2 - Do I have proactive touchpoints each month to educate and deliver added value? 3 - Do I consistently track and commemorate their life and business events? 4 - Do they see me as their “go-to” financial resource/counsel or as just their “advisor”?		
2	Decide specifically what you will do to elevate the experience of your A, B and even C clients.	When - within 72 hours How - Craft a plan that includes at least one action item from <u>each</u> of the six psychological needs covered in the webcast that you will use consistently with your clients.		
3	Ask “A” clients you speak to in the next three weeks how you can elevate their experience with you, and place their input into your plan.	When - over the next 3 weeks How - Ask them: What are three things I/we can do to further elevate your experience with me/us? Probe for clarity.		

My 30 Day Plan For Elevating the Client Experience to Stand Apart from the Competition *(continued)*

	Specific Area I need to Address:	Specific Action Steps to Proceed: When and How am I going to do this?	Specific Challenges/Obstacles to Overcome are:	The Date I will Complete:
4	Craft an agenda for every client and prospect meeting so that it's all about them. Email it to them in advance.	When – Before your next meeting, this week. How - Create a high-level agenda of your points to discuss, but first above all items, ask them <i>what are three things you want to be sure we discuss or accomplish today?</i>		
5	I will...	When - How -		
6	I will...	When - How -		

For more information contact us at SalesDesk@fglife.com or 866.477.7932.

"F&G" is the marketing name for Fidelity & Guaranty Life Insurance Company issuing insurance in the United States outside of New York. Life insurance and annuities issued by Fidelity & Guaranty Life Insurance Company, Des Moines, IA.

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