



ANALYSE CREATE MOTIVATE

**VUE** my partner



### Value-driven Client Partnerships

Professional Services Firms face the difficult task of providing intangible products and services to their clients. While some advisers may deliver a determined “result”, there are often many intangible services, value-adds, outcomes and advice...

...most of which are unseen or not valued by a client. This creates problems for client retention, repeat business, cross-sales, premium pricing and word-of-mouth marketing.

**My Partner** provides Professional Services advisers an opportunity to re-define their client relationships, clarify client and business expectations and work with clients to agree the overall value of the relationship. Ultimately, clients become better partners and more advisers reach a position of trust.

Through a proven six step process you will reveal the value in your business, learn how to position value within a client’s expectations and then how to present your total delivered value to the client at the end of an assignment or process.

### My Partner will help you...

Manage client expectations and better demonstrate the value provided to clients. Strengthen relationships, supports service and boost revenue through improving cross and up selling and referrals.

- Understand client expectations
- Clarify your value offering
- Hold engaging discussions
- Differentiate your service
- Present the total value provided
- Boost client engagement
- Reduce price sensitivity
- Improve willingness to refer
- Increase client retention
- Reduce client turnover

Value  
Relationships  
Expectations

# Value

*What is a cynic? A man who knows the price of everything and the value of nothing.*

Oscar Wilde

## My Partner Workshop Agenda...

### CREATE

Vue Consulting's Learning Methodology is called ANALYSE CREATE MOTIVATE, representing the before, during and after stages of a training experience.

The CREATE phase includes our Workshops and face-to-face learning. **My Partner's** CREATE phase requires the equivalent of a full day of Workshop time, held as two half days 4-6 weeks apart.

The Workshop Agenda itself, covers the following modules...

#### Part 1 - Understand Value

- Clarify the aspects of value in your client relationship
- Identify all the value received by clients in your business
- Review how to discuss initial expectations of value with clients

#### Part 2 - Present Value

- Review of Part 1 activities
- Review the presentation of delivered value to clients
- Examine likely value scenarios which clients may face
- As required, consider the impact of this training on value propositions and client segmentation

### My Partner is particularly suitable for practices or advisers with...

#### A unique service proposition

You will learn to better communicate your value-added services and clearly differentiate yourself from competitors or common perception.

#### Clients with unrealistic expectations

You will develop a process to improve initial client discussions and manage or reset client expectations.

#### A premium priced service

You will be able to demonstrate the total value you provide in a way clients relate to and understand.

#### Repeat business opportunities

You will be able to show clients your entire service proposition and how the client is using your services. You will also boost client engagement and value, encouraging repeat purchases and making cross-sells easier.

#### Transition to new staff or services

You will understand or construct your value proposition and refine your discussion of value with clients.

#### Unappreciative clients

You will boost client satisfaction by boosting client awareness of your efforts, service quality and value.

#### Perception as a commodity

You will uncover all the value in your service and how to compare this with clients to other low value or DIY/Do Nothing alternatives.

#### Retention of long-term relationships

You will learn how to hold clear and effective client review (or debrief) meetings, understand the client's on-going agenda and manage client engagement before problems arise.

## ANALYSE MOTIVATE

See the Vue Consulting brochure for more details on the ANALYSE and MOTIVATE phases of our training.



ANALYSE CREATE MOTIVATE