encore partners

Leading Financial Advisors to Peak Performance

E.N.C.O.R.E. Strategy Session

Evaluate:
- Client Surveys and Report Cards
- Team Review and Development
- Self-Assessment
- Vendor Review

What training/coaching/personal development has been **most helpful**?

What training/coaching/personal development has been **least helpful**?

Reciprocate:
- Family and Friends
- Self
- Client Appreciation
- Team Building
- Strategic Partnerships
- Community Involvement
- Philanthropy

How do you **reward** your success?

What are your **most important relationships**?

Orchestrate:
- 80/20 Client Segmentation
- Up-to-date Client Profiles
- Client Experience Consistently Delivered
- Virtual Relationship with Clients
- Advocacy Development

What percent of your revenues (assets) come from the **top 20%** of your clients?

What is your current **ongoing client communication** strategy?

Engage:
- Clear Vision
- Ultimate Client Defined
- Consistent Investment/Financial Planning Process
- Repeatable and Memorable Story

Why do you do what you do?

How do you describe an **ultimate client** relationship?

Navigate:
- Meaningful Goals and Priorities
- Team Design
- 80/20 Time Model
- Daily Success Habits

What is the **number one financial goal** for your practice?

How much time do you spend in **client-facing activities**?

Cultivate:
- Right-sized Pipeline
- Simple, Self Sustaining Marketing Campaigns
- Ultimate Client Focused Niche Market(s)
- Advocacy Based Referrals and COIs
- Consistent Web and Social Media Presence
- Treat Prospects Like Clients

How many **active prospects** are in your current pipeline?

What is your current **web and social media** strategy?