

the connection quotient

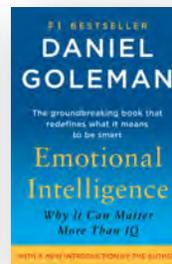
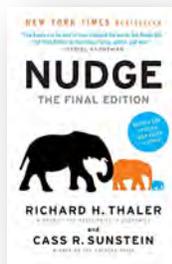
storytelling resources

The Connection Quotient: Storytelling for Sales presentation discusses a number of topics and ideas associated with digitalEQ™ (digital emotional intelligence), behavioral economics, the neuroscience of decision-making, and storytelling for sales effectiveness.

Recent research suggests that 90 percent (or more)* of decisions are emotionally based. A deeper understanding of this hard-wired connection can benefit your practice in many ways, including client acquisition and retention, employee engagement and organizational growth. This is a helpful resource of books, TED Talks and articles for your storytelling journey.

BEHAVIORAL ECONOMICS:

Nudge is an easy-to-read, and entertaining, book that reveals how organizations can help people make better choices in their daily lives.

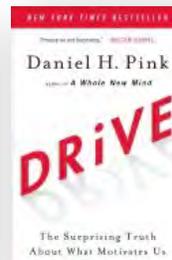
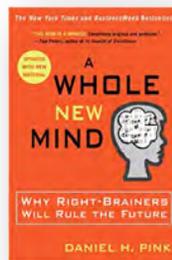


EMOTIONAL INTELLIGENCE (EQ):

Emotional Intelligence launched the wave of understanding surrounding the power of emotions and why EQ may matter more than IQ.

CREATIVITY, EMPATHY & PLAY:

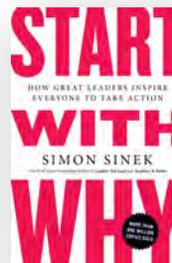
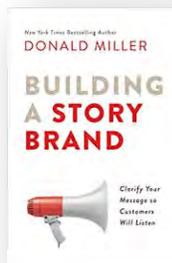
A Whole New Mind outlines Daniel Pink's perspective on how creativity and emotions can drive differentiation in an AI-based world.



MOTIVATION: Pink's other highly influential book argues that autonomy, mastery and purpose are the three drivers behind human motivation, a key for creating impactful and meaningful stories.

STORY-BASED BRANDING:

Based in the hero's journey, *Building a Story Brand* provides a detailed process and program for building a relevant and resonant brand.



PURPOSE-DRIVEN STORIES: Simon Sinek's *Start with Why* takes his popular TED Talk and dives deeper into the power behind an inspirational 'why.' Your 'why' is a great place to begin your 'origin' story.

* SOURCE: Dr. Michael S. Gazzigniga, New York Times 2011; Baba Shiv, Harvard Business Review, 2013



the connection quotient storytelling resources (continued)



PURPOSE-DRIVEN STORIES: Skip reading the book and watch Sinek's TED Talk. Pay close attention to his description of the 'Golden Circle' and how a powerful 'why' is a powerful emotional hook..



NEUROSCIENCE AND STORYTELLING:

Neuroscientist Uri Hasson's research regarding storytelling and brain activity is mesmerizing. In this TED Talk he shares how listeners' brains begin to track with the voice of the storyteller.



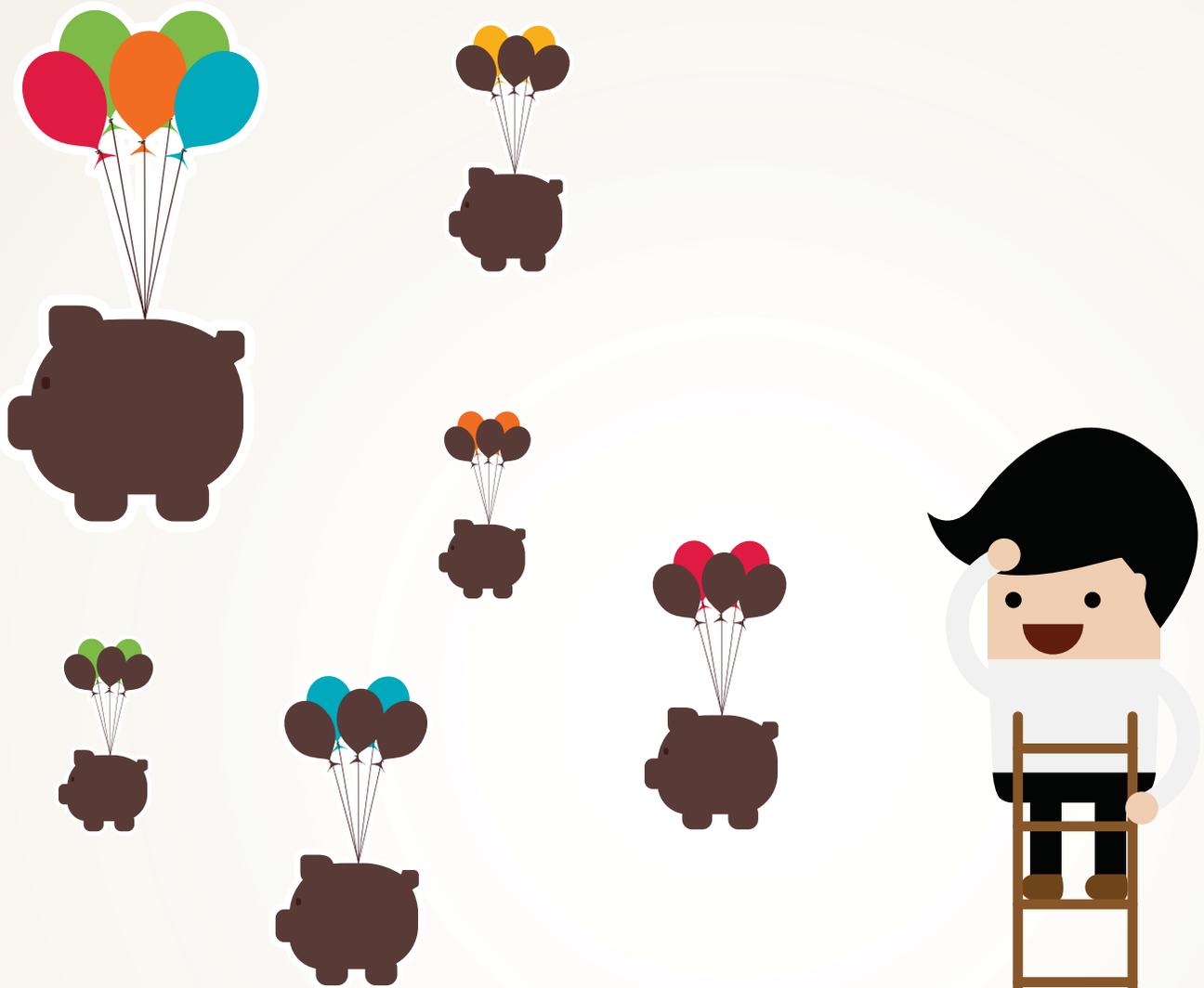
YOUR BRAIN ON BRANDS:

In this TED Radio Hour, a variety of speakers explore the seductive power of brands – and how our brains makes sense of brands. They also discuss pricing and expectations surrounding luxury brands.



STORYTELLING ARCHETYPES:

This is an easy-to-follow article about the ancient skill of storytelling. There are some nice examples of various storytelling genres.



‘Baby’ Steps

Behavioral design works best when difficult decisions follow a continuum of small, easy accomplishments.



BY SHERI FITS

For decades, the retirement industry has concentrated on improving the retirement readiness of American workers through financial literacy education. Workers receive a steady stream of logic-based data and terminology, tons of paperwork (literal or online), and quarterly statements.

Yet, despite the best intentions of many people, industries and companies, the annual household savings rate hovers at 3.8% and three-quarters of Americans do not have enough saved to cover six months of living expenses.¹

So, why is the savings picture still so bleak? Unfortunately, the effort to promote savings focuses almost exclusively on appealing to the brain's frontal cortex. Retirement plan providers pay scant attention to eliciting an emotional response that can build confidence and retirement preparedness.

Behavioral Design Provides Relevant Framework

Plan advisors who work with participants know that getting people to overcome fear and inertia is a huge first step in retirement planning. To help understand this process more fully, academic researchers are

“If people complete one small task, they come to believe in their ability to complete more difficult tasks.”

now looking closely at the complex innate mechanisms by which people make decisions or pursue certain behaviors.

Stanford University Professor BJ Fogg's Behavior Model (FBM), shown in Figure 1, suggests that for a person to perform a desired behavior, he or she must be sufficiently motivated, have the ability to perform the behavior, and be triggered to perform the behavior.²

Fogg believes that if you motivate people to complete easy-to-do activities (the lower right), you can use triggers to guide them along an “activation threshold” and tackle harder-to-complete tasks (such as saving 10% of their salaries).

The issue we work to address in many

enrollment meetings is motivation. Unfortunately motivation alone is variable. (Someone may have just received bad news about his or her cell phone bill as an example.) Making something *easy to do* is engineered into the solution — and is not variable. (Sound like auto enrollment?)

My take on why this approach works brings in another concept. If people can tackle a very simple task, they gain a greater sense of what psychologist Albert Bandura called self-efficacy — the confidence in the ability to exert control over one's own motivation, behavior and social environment. Put another way, if people complete one small task, they come to *believe* in their ability to complete more difficult tasks.

Improved Outcomes Rely on Building Confidence

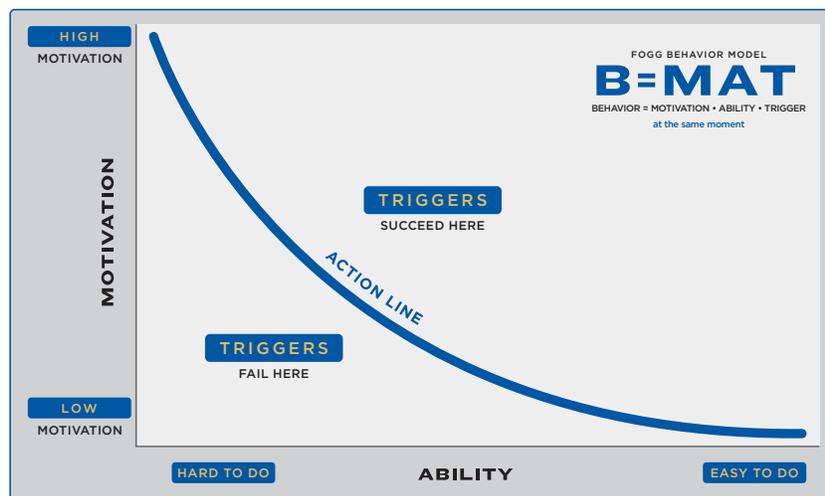
Today, several industry innovators — vWise, Commonwealth Financial and MassMutual, as examples — are using a variety of these behavioral principles to help workers take a more active role in financial planning.

To complement the traditional employee education methods, vWise, Inc. a Southern California software solutions provider, is leading the development of an intriguing participant engagement platform that implicitly employs FBM principles. vWise's software, SmartPlan, uses small, incremental triggers to get an employee to take specific action: watch a 90-second video, select a contribution amount, or choose or make investment adjustments — preferably during a single online session that occurs where and when the employee dictates.

What's unique about SmartPlan is that it's an interactive experience designed to provide *motivation, ability and triggers* to average American investors in a “just-in-time” sequence.

The outcomes-based philosophy behind SmartPlan asserts that financial literacy levels do not predict how actively employees engage with their plan. Instead, the software provides workers with

FIGURE 1: FOGG BEHAVIOR MODEL



Source: © 2007, Dr. BJ Fogg, behavioralmodel.org. Used with permission.

1 “Another Penny Saved: The Economic Benefits of Higher US Housing Saving,” Oxford Economics, http://www.asppa.org/Portals/2/PDFs/White%20Papers/Another%20penny%20saved_FINAL.pdf.

2 BJ Fogg. (2009). A behavior model for persuasive design. Claremont, California: Persuasive '09 (April 26-29).

Emotions play a huge role in either helping or hurting an otherwise sound investment or savings strategy.”

motivating triggers to enter information that generates interest and excitement about their own personal outcomes, and thereby encourages them to join their workplace retirement plan and begin investing.

For Jeremy Katz, a financial advisor with AXA Advisors, SmartPlan helps employees make good decisions. “By viewing short one- or two-minute video vignettes, employees uncover personally relevant information that leads them to take a small action, whereas a typical plan website requires them to click through many more pages that communicate on a far more generic, and to my mind less effective level,” adds Katz.

Small Steps and Accomplishments Create Action

Behavioral design works best when difficult decisions follow a continuum of small, easy accomplishments. Commonwealth Financial Network recently implemented a simple seven-question, multiple choice, survey for use at the beginning of retirement plan enrollment meetings. The survey was designed to accomplish two things:

1. Build a sense of accomplishment — self efficacy — at the outset of the meeting by having employees complete an easy-to-do task.
2. Elicit personal responses from employees regarding how they feel about investing for retirement with phrases such as: *Are you confident? Are you comfortable?* Employees may not intuitively understand their risk tolerance. Many people are able to express how they feel about an issue, particularly when they are prompted with multiple-choice answers.

The survey uses behavioral design and adult learning theory to establish a diverse employee group confidence baseline. Then, the meeting design uses a series of effective “triggers” to move employees up along the activation threshold to motivate them to enroll in the plan or add to their savings.

“Making the presentation personal to each participant is absolutely the key to getting them to engage,” explains John Higgins, a Wealth Manager and Retirement Plan Consultant with Commonwealth. “Plan sponsors get a surge in interest in the plan when employees use this personalized approach.”

Investing is Both Rational and Emotional

While many people agree that investment decisions are best made based on reason, emotions play a huge role in either helping or hurting an otherwise sound investment or savings strategy.

The Society for Grownups, developed by MassMutual and IDEO, operates as a Master’s Program for Adulthood, is trying to bridge the gap between the head and heart to improve financial well-being.

Not surprisingly, the Society primarily targets Millennials, a group that is often unfairly accused of putting off financial planning. By offering small, in person salons on subjects such as Investing & Fine Wine, the Society for Grownups draws similarities between the familiar and unfamiliar, the emotional and logical, and in so doing seeks to draw a distinction between the comfortable and unknown. Their approach provides for a super easy and enjoyable way to discuss and discover the world of finance. (Head over to societyofgrownups.com for some awesome examples of approaching the Millennial marketplace.)

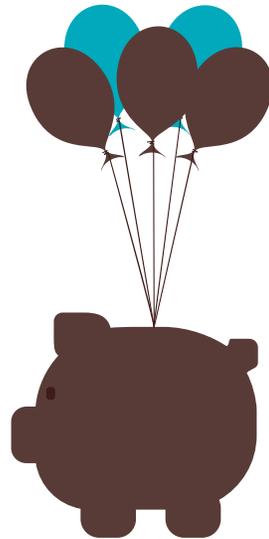
Retirement plan providers and advisors have long looked for viable ways to crack the code for encouraging greater levels of engagement and contributions to their plans. These innovative behavior-based education models show great promise. The tide for participant outcomes finally could be turning. 

»Sheri Fitts is Founder of ShoeFitts Marketing, a nationally based financial services consulting firm based in Portland, Ore.

IMPROVING OUTCOMES

Behavioral design follows a model that invites — rather than demands — a user’s active participation and engagement using three key principles:

- Soliciting real-world information about an employee’s personal situation and preferences lessens common motivational frustrations about financial education and plan engagement.
- “Just-in-time” bite-sized delivery of information helps improve the user’s confidence level — a far better predictor of action than his or her level of financial literacy.
- Specific triggers, properly sequenced along the ‘activation threshold,’ can greatly improve the motivation (and self-efficacy) and guide them to taking desired action.



Explore Your Emotional Intelligence (EQ)

For each item, rate how you display the ability described from 1 (low: I'm not good at this) to 7 (high: I rock at this stuff). Before responding, think of an actual situation in which you have been called on to use the ability. And remember, recall how you act (rather than how you think you should act). This assessment is just for you; you don't have to share it with anyone.

		Low ability					High ability	
1.	Identify physical signs of emotion (Sweaty palms, flushed cheeks, etc.)	1	2	3	4	5	6	7
2.	Relax when under pressure	1	2	3	4	5	6	7
3.	Act productively when angry	1	2	3	4	5	6	7
4.	Act productively in situations that cause anxiety	1	2	3	4	5	6	7
5.	Calm yourself relatively quickly when angry	1	2	3	4	5	6	7
6.	Can identify what emotion is causing your physical reaction	1	2	3	4	5	6	7
7.	Use internal "talk" to affect your emotional state	1	2	3	4	5	6	7
8.	Communicate your feelings effectively and calmly	1	2	3	4	5	6	7
9.	Reflect on negative feelings without too much distress	1	2	3	4	5	6	7
10.	Stay calm when you are the target of anger from others	1	2	3	4	5	6	7
11.	Know when you are thinking negatively	1	2	3	4	5	6	7
12.	Know when your "self-talk" is instructional	1	2	3	4	5	6	7
13.	Know when you are becoming angry	1	2	3	4	5	6	7
14.	Know how you interpret events you encounter	1	2	3	4	5	6	7
15.	Able to control verbal outbursts when angry with someone	1	2	3	4	5	6	7
16.	Accurately communicate what you experience	1	2	3	4	5	6	7
17.	Identify what information influences your interpretations	1	2	3	4	5	6	7
18.	Identify when you experience mood shifts	1	2	3	4	5	6	7
19.	Know when you become defensive							
20.	Know the impact that your behavior has on others	1	2	3	4	5	6	7
21.	Know when your communication is inconsistent with emotions you are experiencing. (e.g. saying "I'm fine" when you're actually experiencing negative emotions)	1	2	3	4	5	6	7

	Low ability					High ability	
22. Self-motivate when you need to get moving on a task	1	2	3	4	5	6	7
23. Regroup quickly after a setback	1	2	3	4	5	6	7
24. Complete long-term tasks in designated timeframes	1	2	3	4	5	6	7
25. Able to identify when you react poorly to a situation	1	2	3	4	5	6	7
26. Stop or change ineffective habits and behaviors	1	2	3	4	5	6	7
27. Develop new and more productive patterns of behavior	1	2	3	4	5	6	7
28. Follow words with actions	1	2	3	4	5	6	7
29. Work out conflicts	1	2	3	4	5	6	7
30. Develop consensus with others	1	2	3	4	5	6	7
31. Mediate conflict between others	1	2	3	4	5	6	7
32. Communicate well with others when under stress	1	2	3	4	5	6	7
33. Identify the emotional dynamic of a group	1	2	3	4	5	6	7
34. Influence others, directly and indirectly	1	2	3	4	5	6	7
35. Build trust with others	1	2	3	4	5	6	7
36. Detect incongruence between others' emotions or feelings and their behaviors.	1	2	3	4	5	6	7
37. Make others feel good	1	2	3	4	5	6	7
38. Identify when someone is not listening or doesn't want advice	1	2	3	4	5	6	7
39. Accurately reflect people's feelings back to them.	1	2	3	4	5	6	7
40. Recognize when others are distressed	1	2	3	4	5	6	7
41. Do things that reduce negative emotional reactions in others	1	2	3	4	5	6	7
42. Show empathy to others	1	2	3	4	5	6	7
43. Engage in conversations with others that focus on feelings (willingness to be vulnerable)	1	2	3	4	5	6	7

Review your answers on the previous pages. Circle the question numbers you rated yourself 4 or lower.

Self Awareness	1	6	9	11	12	13	14	15	17	18	19	20	21	25
Self Regulation	2	3	4	5	7	10	13	15	22	23	24	26	27	28
Empathy	1	19	20	25	31	33	36	38	39	42	43			
Social Skills	8	10	16	28	29	30	31	32	34	35	36	37	42	43

Total circled

Total not circled

Self Awareness

Self Regulation

Empathy

Social Skills

Which aspect(s) of Emotional Intelligence did you have the most questions circled? What things can you start to explore to improve the results you get in your relationships at work, and in life?

Source: Modified and adapted from EQ Assessment created by Anne Bonney, annebonney.com; used with permission.

7 Ways to Develop Emotional Intelligence

Emotional intelligence is commonly described as the ability to perceive, evaluate, and manage emotions in others and ourselves. Many experts consider it to be a better indicator for success than someone's IQ. Your ability to manage yourself and others is dependent on your emotional intelligence.

Try these techniques to develop and increase your emotional intelligence:

1. Accept responsibility for your emotions and actions. Realize that outside influences don't determine your emotions and behavior. You can view things from a different perspective and choose how you'll respond.
2. Work on your listening skills. If you force yourself to focus 100% on whoever you're interacting with, you'll be in a better position to notice and evaluate what they're thinking and feeling.
 - It isn't easy to hide one's emotions, but you still must pay attention. The more information you have, the better you can respond.
3. Develop self-awareness. We're constantly monitoring our bank accounts and the number on the bathroom scale. Yet, few of us monitor our thoughts, emotions, and behavior. Ask yourself throughout the day what you're feeling. Is the way you're feeling negatively affecting your choices?
 - Are you choosing your behaviors in an intelligent manner or allowing others to push your buttons?
4. Learn to effectively deal with your impulses. Impulsiveness is a common cause of personal turmoil. We feel bad, so we order a pizza even after we've already had dinner. Or we grab a credit card and purchase something unnecessary. This type of behavior moves us further away from our objectives.
 - Notice when you're behaving in a counterproductive manner and strive to make a more effective choice. Being successful and happy can be challenging enough on its own. Avoid sabotaging yourself.
5. Volunteer with those less fortunate. Spending time with those in need will increase your sensitivity for others.
 - After witnessing very obvious emotions, you'll become more skilled at picking up on more subtle cues. You're also likely to develop greater sensitivity for others.

6. Keep the focus on responding. Those with lower levels of emotional intelligence react, rather than respond. Responding requires thought and consideration. When you respond, you're making a decision. Reacting is more like a reflex. There's no thought involved, just the emotional response.
 - Have you ever regretted saying or doing something without thinking it through? How would you have handled the situation differently? What can you do to give yourself the mental space to respond more effectively in the future?
 - Avoid lashing out when someone hurts your feelings. Your reaction can make the situation better or worse.
7. Work at increasing your empathy. Those with high levels of emotional intelligence are skilled at recognizing and relating to the emotions of others. Recognizing that someone is upset will allow you to have a more effective response.
 - Ask yourself how you would like to be treated if you were feeling the same emotions.

You probably know someone highly skilled at managing their emotions. Their emphasis is on finding solutions. They refrain from getting angry or defensive. These individuals make intelligent decisions and can view themselves objectively.

Emotional intelligence is an important component of healthy relationships, both at home and work. Your life will be more successful if you can effectively learn how to manage the emotions of yourself and others. The ability to avoid or de-escalate interpersonal conflict is a valuable skill.

amplifying
the heart
of financial services



engaging keynotes and workshops from anywhere

Sheri's in-person and virtual presentations and workshops are designed to help teams avoid marketing traps and time sinks and apply a fresh approach to defining value for clients and prospects. These programs are customized to address each organization's industry-specific challenges and are delivered in whatever format best suits your needs, from pre-recorded custom sales training to live or virtual keynotes with engaging pre- and post-event attendee chats and one-on-one follow-up.

meet sheri

Sheri Fitts, founder/CEO, is a compelling public speaker and financial services marketing, sales and brand guru whose mission is to amplify the heart of financial services. Sheri harnesses the power of emotional connection to help financial professionals create more trust in their client relationships and make their engagements more meaningful to their businesses, and more impactful to their bottom line. Her deep expertise in the retirement plan and wealth management industries, gained over nearly 30 years on both the buy and sell side as well as starting two companies, gives her special insight into what drives investor behavior and sales. Her latest industry innovation, digitalEQ™ (Digital Emotional Intelligence), is Sheri's highly personalized approach to individuals and organizations be unforgettable with thought leadership, branding, marketing, presentations and more.

In 2016, Sheri authored and published *Deconstructing Digital: Simple Ways to Connect with Your Next-Generations Financial Clients*, a guide for advisors to navigating the digital realm. And, as the host of the *Women Rocking Wall Street* podcast, Sheri is championing diversity, gender pay parity and the critical need to include women in corporate boardrooms.



A compassionate technologist and entrepreneur (since age five, when she made and marketed her own rose-scented perfume door-to-door), Sheri is leading the way forward to bring feelings and emotions to financial services—the key to reimagining how advice can be delivered to more people, many of whom need guidance. For a large part of her young life, and as a young single mom, Sheri struggled with financial insecurity. Sheri became a graphic designer at an investment advisory firm in the 1990s and saw for the first time how the financial services industry can make a real difference in people's lives. She realized her life's work was to get the word out that everyone needs a better relationship with money.

Sheri, her husband Greg and their Newfie, Fezzig Andre Fitts-Haworth (yes, The Fezzig from Princess Bride!), love exploring the outdoors in Portland and the Pacific Northwest. Sheri takes regular morning walks up Mount Tabor Park (an extinct volcano), casing the farmers' markets and cooking something delicious, stand-up paddle boarding, Pilates, and working in fused glass in her art studio are her passions. And coffee, made just so. Creativity and exploration are what drives her.

short

To survive the disruptive sea change that’s happening across the financial services industry, you need to uncover and emotionally articulate the life transformations you deliver each day to your clients. Sheri not only believes that ideas and empathy are an advisor’s true currency — she’s been advocating it for nearly 30 years. An internationally recognized financial services speaker, success coach, social media expert (Deconstructing Digital), and visionary pioneer of digital emotional intelligence (digitalEQ™), she’s helped financial services and fintech firms build brands, deepen client relationships, and drive sales and revenue growth. As the host of Women Rocking Wall Street, Sheri has championed gender-pay equity and the critical need to get more women into the boardroom.

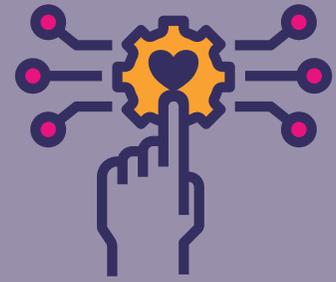
long

In the current disruptive sea change that’s happening across the financial services industry, every interaction with clients and prospects is taking on new urgency, whether conducted in person or virtually. Sheri Fitts is a financial services marketing, sales and brand solutions expert who’s challenging the way that financial services and fintech firms think about how they sell. An internationally recognized speaker, success coach, social media strategy author (Deconstructing Digital), and pioneering developer of digital emotional intelligence (digitalEQ™), she’s helped financial services and fintech firms build brands, deepen client relationships, and drive sales and revenue growth.

From Utah to the UK, Sheri has shared her expertise as an enterprise-level marketer and small business owner with enthusiastic and engaged audiences. She’s always passionate about exploring new ways to help industry leaders broaden their sales reach and marketing effectiveness. Going beyond talking-head delivery, Sheri consults industry leaders and their teams on how to radically shift their approaches to attracting best-fit clients and drive sales and retention goals.

Firmly believing that leading with the heart instead of the head is the best path to sustainability and growth, her firm, Sheri Fitts & Co, is once again innovating financial services sales and marketing with digitalEQ™, a turnkey virtual sales and marketing solution that offers financial professionals the digital tools and technical command they need to evolve towards more empathetic and personalized client engagement.





Seizing Opportunities with digitalEQ™

If emotional intelligence (EQ) is the ability to discern, comprehend and manage our own emotions as well those of others, digitalEQ is the ability to evolve and apply EQ through digital channels. With attendance limited to 50 or fewer participants, the hands-on digitalEQ™ Workshop offers a deep dive into the digitalEQ playbook, ultimately culminating with each attendee crafting a personalized action plan. With facilitated discussions and exercises in how to foster EQ in digital as well as real-life meetings.

Attendees will discover

- ◆ How emotionally driven storytelling and experiences change biochemical responses in the brain that deepen connections and relationships
- ◆ Why brands that effectively communicate emotion often lead their industries in terms of topline growth and market share

Key benefits

- ◆ Close more business by fusing technology, empathy, marketing strategy and brand equity with emotional intelligence
- ◆ Increase your team's productivity during a time of client transitions by communicating EQ in every interaction
- ◆ Empower your team to deepen relationships by leveraging EQ—even in a fast-paced business environment
- ◆ Discover how empathy and patience lead to more constructive conversations, making clients happier and relationships potentially more profitable

Format

The insights and ideas fueled by the digitalEQ™ methodology can be delivered through both workshop and keynotes focused on personal branding, sales, marketing and diversity and inclusion efforts.



Out Care Your Competition

The Power of a Customer-Centric Brand

Think of today's great consumer brands — Apple, Starbucks, Zappos. These companies have profoundly shifted their focus from commodities (cell phones, coffee, shoes) to the customer for long-term sustainable competitive advantage. The “secret sauce” these companies are bottling is simple: they get personal and connect at a human level. They create fierce brand loyalty, and those ecstatic fans willingly refer new customers.

By focusing on exceeding expectations and “out-caring” the competition, attendees can drive new relationships and growth for their firms. To be successful, organizations must deliver a customer-centric brand experience that leads to referrals and a competitive advantage for their practice. Out Care Your Competition attendees will discover the essential elements that can turn customer-centric businesses into referrals and new growth for their practice.

Attendees will discover

- ◆ How to link customer discovery to strategy development
- ◆ What it takes to understand customer needs and “create the experience” that goes beyond selling
- ◆ Strategies for more impactful customer relationships

Key benefits

- ◆ Align product and service delivery with a client-centric strategy
- ◆ Identify brand touchpoint opportunities
- ◆ Creating a winning customer experience
- ◆ Provide a memorable experience for all humans that engage with their brand
- ◆ Build word-of-mouth into their brand

Format

This session can be offered as a one-hour high-level breakout, or a three-hour deep dive training.



Your Brand. Your Business. **Your Bottom Line.**

New financial services regulation has flattened the competitive landscape. Soon, every advisor will be a fiduciary and leveled comp the norm. Fees will be compressed as the robo-onslaught continues. This session will show you how to change the conversation by rethinking the power and value of brand.

Attendees will discover

- ◆ How to locate the intersection of brand and the “perceived” value of your services
- ◆ What’s the secret code behind a passion-powered brand?
- ◆ How to generate deeper client relationships and earn new business
- ◆ The necessary steps to creating a unique brand and infusing it into all your sales and service efforts

Key benefits

- ◆ Build brand equity by framing your value proposition in terms that elicit an emotional response to your brand in client interactions
- ◆ Improve your close rate by finding more best-fit clients, uncovering true needs and validating the connection between those needs and how you want to spend your time
- ◆ Deepen client relationships in ways that increase client satisfaction and helps earn you new business
- ◆ Infuse passion into your brand, making it the cornerstone of your sales, client onboarding and service activities



Operation: Amplify

A Thought Leadership Masterclass for Financial Professionals

The financial services industry is grappling with a longstanding problem, and it's getting worse. We face a plummeting trust curve that makes investors and prospects hesitant to connect. Financial professionals have also gotten a bad rap as being pushy, aggressive, and self-centered. Whether they explicitly say it, prospects may think, "I don't even want to have a conversation, because you're just going to try to sell me something."

If you're ready to catapult your business development efforts with the genius you already have inside you, Operation: Amplify could be for you. This three-day immersive experience is designed specifically to help you step into and package your brilliance by giving you the tools, frameworks, and methods to convert your years of hard-earned knowledge into thought leadership that showcases you as an industry leader.

Attendees will discover

- ◆ Phrase your understanding of client problems in terms that transcend money. Emotions are at the root of all decisions and together we'll craft your value proposition and positioning statement so that it touches their hearts and minds, instead of just their wallets
- ◆ Design your first-impression experience and customer journey that enables you to meet both the financial and emotional needs of your clients and prospects. Having a clear vision of how you want to be perceived is the key to being remembered
- ◆ How you express yourself in both the written and spoken word to raise your level of awareness in your marketing to create powerful and lasting connections from your first engagement—face-to-face or digital

Key benefits

- ◆ Focus on client satisfaction and retention (the true pillars of profitability) by having prospects seek YOU out
- ◆ Grow your revenue with stickier relationships that allow you to cross-sell your service and prove your value—over and over again
- ◆ Automate your outreach without raising compliance red flags or losing the critical emotional connection with your audience
- ◆ Deepen client loyalty, so that referrals materialize without having to directly ask for them
- ◆ Remove friction from your sales process, so you spend less time breaking down resistance and more time having conversations that matter

more presentations and workshops

Lights, Camera, SELL!

Compete effectively in the virtual environment

The Power (and Necessity) of Your Personal Brand

Solidify your message and amplify your influence

Mastering New Media

Using digital, video and social media to secure sales

Social Selling

Optimizing your LinkedIn presence and outreach for sales success



It was a fun presentation packed with incredibly useful information. Every financial services professional should learn this stuff!

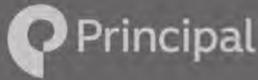
G.K., Vice President
DCIO Division of
Leading Asset Management Firm



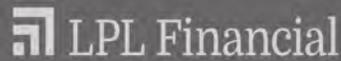
in great company
representative client list



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BlackRock



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